

Final Report

# Small Business Study on Black Businesses in the Portland-Metro Area

October 21, 2021

Funded By:  
Energy Trust of Oregon

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# Executive Summary

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This report describes the results of a qualitative research study that Nathan Webster and Associates, LLC (NWLLC) conducted for Energy Trust of Oregon (Energy Trust) that explored the awareness of energy use by Black owned businesses and the methods around energy conservation and best practices through Energy Trust. Those interviewed identified as Black and/or African American small business owners within the greater Portland-Metro area. The emphasis was on their businesses and their energy use awareness. Energy Trust sponsored this research study to gather insights on how they can better serve the community.

This research explores the following areas:

- Awareness of energy and energy programs by Black owned businesses and their views on energy cost
- Interest in improving energy use and receiving information on how to do so
- Knowledge of business space, energy use, and related expenses
- Reasoning of when to upgrade equipment and spaces
- Operations of Black owned businesses regarding the impacts of COVID-19, as well as available financial incentives utilized

This study includes two data collection sets due to COVID-19 delays; the first set was collected between March-April 2020 when lockdown restrictions for safety went into effect and the research project was postponed, and the second was in 2021 following the approval to resume the study from Energy Trust using alternative collection methods, such as video conferencing.

Data collection activities included surveys and interviews through telephone, video conferencing, and in-person methods. All respondents were previously reviewed and approved to be contacted for this study by Energy Trust.

Of those contacted, 28 agreed to participate and completed the in-depth interview. However, one respondent's data was removed due to disqualification from the study.

We will refer to the group of respondents as "respondents" and each respondent was assigned a designation to maintain anonymity.

Each research question lists key findings summarized for review. The report first presents key findings and then the overall conclusions and recommendations.

# Memo

**To:** Energy Trust Evaluation Team  
**From:** Ashley Bartels, Susan Jowaiszas  
**cc:** Tracy Scott  
**Date:** October 29, 2021  
**Re:** Staff Response: Black Businesses / Qualitative Market Research

Knowledge about businesses owned by Blacks in Portland and Vancouver has been particularly challenging to find. These customers have not participated in our programs in substantial numbers, represent a fairly small proportion of businesses in general, and general distrust of institutions, including utilities and Energy Trust, is high, particularly in the Portland metro area. This is a barrier to identifying, let alone gaining trust with, Black customers.

To enable Energy Trust to be more successful in reaching and connecting with Black businesses, Energy Trust retained the services of Nathan Webster & Associates. Nathan attends meetings of Oregon Association of Minority Entrepreneurs (OAME) and met Energy Trust's Sr. Manager of Customer Service, Cameron Starr, who referred him to the program marketing team.

Program marketing staff worked closely with Nathan to orient him to Energy Trust's mission and programs, develop an interview guide for qualitative interviews, and identify businesses to be interviewed for the research study. Nathan started the study in spring 2020 with qualitative in-person interviews, and we made the joint decision to suspend the work once businesses were temporarily shut down due to the rise of COVID-19. The work was revived in Spring 2021 and Nathan completed the interviews mostly via Zoom.

The research provides valuable insights into how Black businesses operate and how they think about energy. The biggest issue boiled down to trust. These business owners had a very skeptical view of Energy Trust based on their own experiences but were intrigued by the idea of becoming more energy efficient if trust could be established.

Energy Trust can build on the outreach and insights from this research to begin to address these barriers:

- Create a cohort of Black businesses from interviewees. The research scope had its limits but there are natural follow-up questions that could be answered. Building trust within the Black business community will happen customer by customer. Building off this group of interviewees to create a kind of "cohort" of Black businesses could be an effective way to build this trust. While some of respondents know each other, some could make new connections through this cohort. In this way, Energy Trust could support the Black business community in a material way.

- Look for opportunities to collaborate with Black community groups to co-deliver offerings. The report mentioned several community groups that could be great community partners for businesses and for residents.
- Deliver benefit to the Black community. As one example, the Business Lighting direct install offering will be directly presented to interviewees as just one way to demonstrate that Energy Trust heard Black business owners and wants to deliver benefit to them.
- Share out these findings with other Energy Trust program managers, program implementers and utilities so they can make connections to their own work.

# Key Findings

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## **Finding #1**

**Black businesses are struggling to make a profit during the Pandemic.** During the interviews, the business-to-consumer (B2C) companies struggled to ensure their businesses stayed open during the time of this study, due to the restrictions placed on businesses related to COVID-19 safety. It was not until businesses reopened that interviewees could speak during business hours.

There was no theme to the reasons why other companies did better than others. The largest number of respondents represented in the interviews was Health and Beauty businesses.

## **Finding #2**

**The business owners interviewed noted either a significant increase, or drastic stop, in business compared to last year.**

**For the B2C companies, COVID-19 restrictions caused many businesses to rapidly alter their practices in order to keep their doors open during the pandemic.** While many business-to-business (B2B) companies found different methods to increase their customer base via their social media feeds, various business owners had to step in and field calls with the shift from in-person to virtual/remote work. Several restaurants modified their hours, which included not being open seven days a week.

Three construction companies that were contacted struggled to reply to our communications via email or phone due to the high volume of contacts they were receiving. The receptionists documented the phone calls and took voicemails. They all said the workload was high and couldn't promise a call back.

## **Finding #3**

**Black business owners often associated Energy Trust with a utility company or with utility bills.** When the interviewees were asked about Energy Trust, they most commonly associated Energy Trust with utility bills and not opportunities and bill assistance programs like the residential programs. Several interviewees volunteered information that their electric bill was behind at the time of the interview. Several businesses found creative ways to pay utility bills off, including support from their local community members via large donations.

Initially, those unfamiliar with Energy Trust thought the interview request was regarding an unpaid bill. The vast majority needed more than a brief description before they agreed to do the interview. After Energy Trust's role in the community was described, the interviewees wanted to learn more.

## **Finding #4**

**The best ways of reaching Black owned businesses, particularly B2C, isn't through digital methods.** The best way to engage the Black business owner community is through personal contact and connection. There are known influencers in the community who can help with this effort.

This research began with in-person interviews. Communications to businesses via email, phone, and social media received a lower response rate, which encouraged in-person meetings,

some impromptu following an initial in-person visit. In person interviews would have been the preferred method of interviewing however COVID-19 restrictions forced interviews to go completely digital and made it more difficult to communicate with the business owners during the study.

# 1. Introduction

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In 2019, Energy Trust and Nathan Webster & Associates, LLC agreed to complete a study with the purpose of learning about the energy conservation habits and sustainability practices of Black owned businesses. This research report summarizes 28 (27 following a participant's ineligibility) in-depth interviews conducted for Energy Trust in early 2020 and 2021. These interviewees were identified as Black and African American (Black) small business owners within the Portland-Vancouver metropolitan area.

The goal of this research was to learn more about the business and business owner. These interviews sought to learn more about the participant's business, their operational habits, understanding of energy costs, and knowledge about Energy Trust. A list of potential businesses was created. After Energy Trust approved the list, the initial contact was made in person, by email and by phone.

This research explores the following areas:

- Awareness of energy and energy programs by Black owned businesses and their views on energy cost
- Interest in improving energy use and receiving information on how to do so
- Knowledge of business space, energy use, and related expenses
- Reasoning of when to upgrade equipment and spaces
- Operations of Black owned businesses regarding the impacts of COVID-19, as well as available financial incentives utilized

To answer these questions, the research team at Nathan Webster and Associates, LLC (team) conducted qualitative interviews with 28 Black business owners who operate a business in the Portland-Vancouver metropolitan area. Participants received a \$50 gift card for their participation in the study.

Additional sections in this report include:

- Program Data, Targets, and Completed Interviews
- Findings
- Conclusions and Recommendations

## 2. Program Data, Targets, and Completed Interviews

The research plan required Nathan Webster & Associates, LLC team members to connect directly in a one-on-one setting with the respondent (business owner). This allowed for each respondent to have time to consider the question and reply with more detail and accuracy.

- Interviews completed with 28 business owners who identify as Black or African American
- 27 interviews used as one respondent’s responses were removed from review due to the participant no longer being eligible for the study (leaving 27 responses)
  - 11 were conducted over video conferencing (Zoom)
  - 11 were conducted in-person
  - Three were conducted over the phone
  - Two were conducted through a survey
- Timing of interviews includes 2020 prior to COVID-19 restrictions and 2021 after restrictions were in place.
- The researcher contacted 41 Black-owned businesses and was able to complete interviews with 27 for a 66% response rate.

Table 2-1 Interview Data

Characteristic	Count	Percent
Interview Year		
2021	21	77.78%
2020	6	22.22%
Interview Method		
Video Conferencing (Zoom)	11	40.74%
In-Person	11	40.74%
Telephone	3	11.11%
Survey	2	7.41%

## 2.1. Methods

Interviews were conducted in 2020 prior to COVID-19 restrictions and during various phases of reopening in 2021, with data collection completed by June 2021. Interviews ranged from 30-60 minutes and some over an hour. During the interview, the researcher took notes using a worksheet. Interviews were primarily done over the phone, in-person, and using video conferencing, but two were completed using a survey. Several respondents required multiple methods or attempts to contact to complete the interview. COVID-19 restrictions required a lot of change and adaptation for businesses during the duration of the study.

There were difficulties during the study related to the lack of time and COVID restrictions. Many interviewees declined to participate out of caution or fear. Some expressions of why included:

- Interviewer was seen as a stranger with no direct relationship to the community
- Energy Trust of Oregon was seen as a foreign entity
- Businesses were operating virtually and hesitant to meet or answer questions remotely
- Business were unable to make or have time for an interview
- Racial tensions were at an all-time high during the study which made discussing Black topics difficult for some

Several interviewees also expressed being “tired” at having to explain the “plight” of the Black person to “white people” (large entities like The Energy Trust) and didn’t see how vocalizing or responding would help improve the situation. For example, one potential interviewee stated:

*“I appreciate you reaching out. Honestly, I am tired of companies asking about this topic without any results. To me it is them and other companies checking a box. I would be more impressed if they came out with what they have done and what they plan to do with measurables connected to it such as the CEO, President, VP's, Directors and Managers compensation connected to the success. If I see this in writing I would be willing to speak to them about this otherwise I know they are not serious.*

*We need change and action. No more words...*

*Sorry, I cannot help you with this but I am tired bro!”*

The largest obstacle was that most interviewees did not know who Energy Trust is or what their business is. So not understanding how Energy Trust could help their business posed a problem for business owners.

### 3. Findings

Below you will find demographic data related to the participants in this study. Table 3-1 shows that most business owners identified as Generation X. This data point was an important component because it was a driver for some of the respondents' answers with other questions behind their why, location, and future succession.

Data shows that most participants seek to provide for their family, set their family up for the future, expand and franchise their business, dominate their sector/specialty, and survive the effects of COVID-19.

Most businesses settled their businesses in Portland-Vancouver because they consider it their community and/or were born and raised in it. Some spoke very passionately about staying in Portland, even in spite of the heated protests and uncertainty of COVID-19.

Most businesses interviewed can be categorized under Health & Beauty or Cafe/Restaurant sectors.

The majority of these businesses did not acquire a loan or financial assistance of any kind during COVID-19. They also report struggling and not knowing of financial incentives like those available through Energy Trust.

Table 3-1: Participant demographics and characteristics: Generation Identifier

Characteristic	Count	Percent
Generation Interviewee Identifies as		
Baby Boomer (1946-1964)	6	22.22%
Generation Z (1997-present)	1	3.70%
Millennial (1981-1996)	4	14.81%
Generation X (1965-1980)	16	59.26%

The majority of business owners interviewed are Generation X with ages between 41 to 56 years old. There was only one who didn't want to provide their actual age.

This question was typically asked first.

Table 3-2: Participant demographics and characteristics: Primary Business Info

Location of Primary Business		
Portland	19	70.37%
Vancouver	6	22.22%

Beaverton	1	3.70%
Salem	1	3.70%
Number of Businesses Owned		
More than One	3	11.11%
One Reported	24	88.89%

Table 3-3: Participant demographics and characteristics: Business Ownership

Business Ownership in Years		
0-2	3	11.11%
3-5	3	11.11%
6-10	4	14.81%
11-20	12	44.44%
21+	5	18.52%

There was only one interviewee who started their business within the 2021 calendar year, and the other two started 2020 and earlier under the two-year mark.

These business owners favored entrepreneurship over being an employee for someone else. They seek to find ways to be more competitive in their sector. In spite of the pandemic, none of them wavered on the professional decisions and their business was treated as their retirement.

Table 3-4: Participant demographics and characteristics: Business Goals

Business Goals	
Provide for their Family	
Pass the Business to Their Family in the future	
Expand/Franchise	
Take Over the World/Their Sector	
Help Others in the Community	
Still Exist/Make it through the pandemic	

Table 3-5: Participant demographics and characteristics: Business Area Reason

Reason for Operating a Business in the Area		
Acquired Business in the Area	1	3.70%
Fell in Love with Area After Visit/College	5	18.52%
Fit Business Needs	3	11.11%
Moved for Family	1	3.70%
No Answer	5	18.52%
Considers it their Personal Community/raised here	12	44.44%

A theme amongst interviewees showed that although many may have started a business to make money for practical reasons, the owners were sustaining their business for some sort of altruistic reason, beyond themselves, such as community health.

From March 17 to May 24, 2020, the Oregon and Washington Stay Home Order and Coronavirus Aid, Relief, and Economic Security (CARES) Act were two significant events. However, those two events took a back seat on May 25, 2020, because the world witnessed George Floyd's death by a Minneapolis police officer. This caused an uproar in every metropolitan city in the United States, and Portland, OR's demonstrations and protests brought international exposure and prompted federal invention by Homeland Security.

By day, Portland had peaceful demonstrations to show support for George Floyd's life and the others who were Black, unarmed, and killed by police. By night, violent protests erupted for over 150 days altering Downtown Portland's buildings, businesses, and culture. The Black community responded in different ways. The most recognized movement during this time was Black Lives Matter, but Portland has many other Black activist organizations and leaders.

One interviewee has been one of the most vocal business activists and has received death threats but hasn't stopped her desire to help the Black community via her newest organization. The organization's goal is to help educate the mindset of systemic racism's oppression and how it impacts the growth of a person of color.

Table 3-6: Participant demographics and characteristics: Business Category

Business Category		
Art Gallery	1	3.70%
Automotive	1	3.70%
Business Services	2	7.41%
Cafe/Restaurant	5	18.52%

Clothing	1	3.70%
Construction	2	7.41%
Education	1	3.70%
Health & Beauty	5	18.52%
Landscape	1	3.70%
Manufacturing	1	3.70%
Media	2	7.41%
Medical	2	7.41%
Production	1	3.70%
Transportation	2	7.41%

These categorizations are not the best representative of the business owners, but its industry specific to the conducted work. Also, there are some niches.

Table 3-7: Participant demographics and characteristics: Worker Type

Number of People Employed or Subcontracting		
1-10	19	70.37%
11-20	2	7.41%
21-30	1	3.70%
31-40	0	0.00%
41-50	0	0.00%
51-100	1	3.70%
100+	1	3.70%
No Answer	3	11.11%

Over 70% of the owners have less than 10 employees on staff. One research respondent employed the highest number of Black or African-American workers in Oregon state with over 300+ individuals.

Table 3-8: Participant demographics and characteristics: Business Funding Source

Source of Funding		
PPP Loan	5	25%
Used Other Forms of Funding	2	1%
Did not receive funding from outside sources	13	65%
There were (7) companies interviewed in 2020 when PPP was issued.		

All respondents stated they didn't receive any of the initial Paycheck Protection Program (PPP). During the time of the interviews, the second round was open and several made connections with a local program or their financial personnel was assisting them with completing the application before the deadline.

Again, there is no theme to connect all the dots with these businesses. Each of them had a different path for startup funds and supplemental funding during the pandemic.

This question was answered in various ways due to the type of business and different funding. A few businesses were funded under the Oregon Cares Fund, which was Oregon's effort to specifically assist Black-owned businesses.

According to *Oregon Cares Fund aids Black-owned businesses* article by Pamplin Media's Ray Pitz, the Oregon Cares Fund distributed \$62 million to businesses, organizations, families, and individuals. "As of November 23, 2020, \$29.7 million has been awarded and is in the bank accounts of those who applied. That includes \$13.1 million distributed to businesses and organizations and \$16.5 million given to individuals and families" (Pitz, 2020). For Black Oregonians, this was a big deal.

The Oregon Cares Fund was administered by Oregon non-profit, The Contingent. Other interviewees mentioned the City of Portland's Proper Portland and Micro Enterprise Services of Oregon (MESO). Although the interviewees made mention of these groups, not all of them received funding.

At the current moment, as this report is being produced, the COVID-19 pandemic is still in effect, but restrictions are being lifted in Oregon and Washington. During summer 2021, companies are opening their doors.

Table 3-9: Energy Use and Energy Trust Familiarity

Characteristic	Count	Percent
Reported Annual Energy Costs		
Do Not Know	13	48.15%
Never Thought About It	1	3.70%
Included in Cost of Business Space	4	14.81%

Less Than \$1000 a Year	4	14.81%
Over \$1000 a Year	3	11.11%
No Answer/Declined to Answer	2	7.41%

For almost all the interviewees, energy was not a primary concern. Some businesses should have considered it to be the primary focus depending on the industry, but they hadn't heard of Energy Trust or its energy programs.

Table 3-10: Energy Use and Energy Trust Familiarity

Familiar with Energy Trust of Oregon		
Yes	6	22.22%
No	21	77.78%

Most interviewees had no knowledge about Energy Trust programs. Out of the 27 business owners interviewed, only five (two in 2020 and three in 2021) knew of the programs. That's a ratio of approximately 1:6 or 18%.

The three with knowledge didn't give specifics on how they knew because it was referred to them from another source. Only one of the five interviewees have ever spoke directly to Energy Trust representatives. That one business owner was aware of the organization but wasn't current with the recent program offerings.

When the question was asked, here are some of the responses the interviewees gave:

- *“Nah. I've never heard. I've never heard of it.”*
- *“Uh, never heard of them...Not until you, uh, mentioned something.”*
- *“I know some of the programs. I say that I think that there was some transition that occurred. Um, so I'm not, I know that, for example, I know that certain incentives kind of show up and go away and then show back up. So, I can't really say I have my finger on the pulse of what programs are currently being marketed and, um, the return on that.”*

The three companies who knew of Energy Trust had participated in a program.

Table 3-11: Energy Use and Energy Trust Familiarity

Can Recall Interacting with or meeting an Energy Trust Representative		
Yes	1	3.70%
No	26	96.30%

Table 3-12: Business Square footage and Energy Use

Business Square Footage		
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0-999 sq ft	6	22.22%
1000-1999 sq ft	6	22.22%
2000-2999 sq ft	3	11.11%
3000-3999 sq ft	1	3.70%
4000-4999 sq ft	0	0.00%
5000-5999 sq ft	2	7.41%
6000-6999 sq ft	0	0.00%
7000-7999 sq ft	1	3.70%
8000-8999 sq ft	0	0.00%
9000-9999 sq ft	0	0.00%
10,000-49,000 sq ft	1	3.70%
50,000-99,999 sq ft	1	3.70%
Square Footage Unknown	6	22.22%

Approximately 25% of the interviewees didn't know the square footage of their business. They all offered to follow up but didn't know off the top of their heads. Most interviewees (29%) had office spaces averaging 1,000 to 2,499 square feet.

Table 3-13: Business Square footage and Energy Use

Owner Belief that they are Maximizing Space Efficiency for Energy Use		
Yes	1	3.70%
No or No Answer	26	96.30%

All companies wanted to learn more from Energy Trust. This is an opportunity for outreach as the recommendations are implemented.

Table 3-14: Business Square footage and Energy Use

Have You Thought about ways to reduce operating costs by changing how you use energy?		
Yes	12	44.44%
No	15	55.56%

One salon owner expressed the need to have a commercial space for her growth fulfill the new needs of her company. During the interview, she spoke to some preliminary work before reaching out to the Energy Trust.

An overwhelming majority requested resources for how to start the process as they were unsure where to start.

Table 3-15: Interest in Learning More About Energy Trust of Oregon

Interested in Learning More from the Energy Trust of Oregon		
Yes	15	55.56%
No	2	7.41%
Maybe	2	7.41%
Owner Is Not In Control Of Energy Use	1	3.70%
No Answer	7	25.93%

All welcomed the idea of a focus group without any declines. They all wanted to learn more about Energy Trust and their programs.

For those that didn't have an answer about who the Energy Trust was or what they had to offer, they stated a want to conduct their own research before giving an answer.

Table 3-16: Repairs Information

When repairs are done, who does them?		
Landlord/Building Owner (if not business owner)	8	29.63%
No Answer	7	25.93%
Outside Vendors (get quotes)	3	11.11%
Business Owner	6	22.22%
In-House (employee)	2	7.41%
Depends on the Maintenance Need	1	3.70%
Themes for how business owners Determine Updates		
Do Research		
When Necessary Only		
Consult Vendors and Specialists		

Look for Deals
Consider Cost vs Need
Not Sure / Had No Plan or Ideas

This question regarding repairs created a myriad of answers, but it was very evident no company had a specific contractor or seasonality to updates. The only exception was that leased machinery is on a maintenance schedule and was conducted by the company.

Table 3-17: Interviewee Questions

Questions or Comments
What can be done with windows for the storefront to conserve energy?
People like us exist and deserve help
No Answer
Energy is a very important piece of their business and they would like to know everything they can.
If companies can connect hungry businesses to resources (instead of expecting the businesses to find them) then it will be more effective.
What does the Energy Trust do?

### 3.1. Business Operations

This section describes how business owners obtain information regarding project improvements and equipment purchasing.

The standard seems to be that they replace and update when it is necessary, meaning that their business operations are disrupted or equipment is no longer operational. This is all dependent on the need vs cost and whether repairs can be done in house.

### 3.2. Awareness of Energy and Energy Programs

Six respondents recalled having any interaction with Energy Trust or their representatives during their business ownership. This may be a result of a lack of projects on their part that would qualify for Energy Trust incentives, but most business owners interviewed were not familiar with the Energy Trust as a business entity.

For most interviewees, energy use was not a primary concern. Some businesses suggested they should be more aware of their energy use, but they hadn't heard of any organizations or energy programs to reach out to prior to this study.

### 3.3. Opportunities for Engagement

Most of the business owners interviewed expressed an interest in learning more about programs that would reduce energy use and potentially provide a financial incentive. Some also expressed a desire to spread awareness in the community, however, they were still unclear about the programs and offerings from Energy Trust.

Energy was not a concern until the idea that using it wisely would save money and benefit their business. Some interviewees mentioned the idea to partner with larger Black owned businesses and inspire other businesses to adopt the same habits. One interviewee remarked:

*“And if they are interested in diversity and inclusion, it's not free and the best way to do it. That is by aligning themselves with entities that represent that, which they want to improve upon. So if you, if they're looking at getting information out to Black people, then maybe you need to be working with us and serve as Black people, but that ain't free. You know, we get these calls from folks and say, you know, we have this program.”*

*“Do you have some Black folks? Well, yeah, but, but if you got money, then why aren't you paying us? Cause we're basically doing recruitment for you. And for you and we're doing it free.”*

*“So, if you have resources and you bring resources to the table, because my people already got a job, it ain't, they job to run around and find people to put in your program, even though it might benefit them.”*

*“But if you've got resources, then we can actually either hire or identify somebody and give them resources to go do that work. Uh, and then it becomes a win-win for everybody.”*

# Conclusions

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## Conclusion #1

### **It will take an investment of time and hours on the part of Energy Trust within the Black community to establish trust**

There is an adage that goes “people do business with people who they know, like, and trust.” To build trust, Energy Trust will need to engage, educate, and commit to this community in order to gain their support. Engaging and educating through an organization like the Life Change Church and Self Enhancement Incorporated would mean reaching a good portion of the Black community in Portland, as they have been located in and serving the Black community for over 20 years. They have already built the relationships and know the key players, which makes them perfect for partnerships.

One of the best ways to gain trust in the Black community is to work side by side with the community members. Working with these organizations would involve collaborating with their programs and services. All the interviewees expressed an excitement to be on the cutting edge of technology and spoke to optimizing their operations to support initiatives like renewable energy.

Without the details articulated and laid out, there will be hesitation due to the unfamiliarity with Energy Trust. Some Black business owners need to feel seen and understood before they can agree to understand and participate in a program that might change how they do business operations.

Black is a culture with a specific language to navigate. There is a difference between Black Africans and Black African-Americans. Another element to consider are the Black leaders with decades of experience capacity building within the Portland-Vancouver Metro area.

Energy Trust could focus on the smaller B2C businesses which would gain the trust of the community because the more time and effort that is spent working with these small businesses generates word-of-mouth buzz. After enough business is helped in a particular industry or sector, other companies in the Black community will follow suit, provided the results are positive. Building relationships with smaller companies would also increase access to other Black-owned company leader networks.

Incentive programs that assist Black businesses in their efforts to not only survive, but thrive, was mentioned in several interviews. It is not about sponsorship, but rather a diversification of resources available to that business and awareness of and access to programs that can make a difference in their bottom line.

The focus should be to serve Black businesses within the network, geographic area, and industry to the best of Energy Trust’s capacity, rather than to make a sale.

Creating the opportunity for trust starts with Energy Trust being the actor and not the reactor who waits for the community to engage with the Energy Trust. If the business owner is unaware of the organization’s existence, how would they be expected to seek out the organization. A

welcome packet to new businesses that outline money saving options would get people aware and planning for future phases of their business.

## Conclusion #2

### **Energy Trust will need to provide educational workshops on energy savings and cash incentives using community organization and support.**

Educational workshops do not have to be significant endeavors or grand events. Depending on the number of personnel supporting this endeavor, staff can provide different modalities of workshops via technology used for webinars and learning management systems. Energy Trust currently has over 20 different offerings on their site related to businesses, however, there are limited offerings related to training events for businesses. While it is important to acknowledge the limitations of educational events during a pandemic, there are virtual options for education and videos or pamphlets that could be run through for new businesses on a regular basis.

Provide free classes on energy improvements, energy savings, and cash incentives for businesses. Every industry will provide a list of different opportunities. This shouldn't be a broad stroke.

For example, Health & Beauty firms stated the following could be upgraded:

- air-conditioning units
- air flow (design)
- overhead lights
- blow dryers (wall outlet & sitting)
- heating for retail spaces with windows surroundings

The Health and Beauty companies expressed the difficulties working with landlords, tenant improvements, and lack of vendors who understood their businesses.

Due to all the various companies, the classes should have some virtual component. The newest technology platforms allow for the live events to be replayed for those who cannot to attend in-person. This fills the void of lack of classes, even if they're more explainer videos to build upon Conclusion #1.

The pandemic has also created a different norm for creating safe spaces. As Energy Trust ramps up an opportunity to serve a bigger and more diverse pool, these classes will provide the initial investment for building trust and gaining support for programs. Providing resources is essential but providing equitable access is paramount; that starts with education.

Since the pandemic, virtual meetings and working-from-home have changed the dynamics of the workplace environment. However, some Black businesses haven't used some of the virtual tools. As two companies didn't use Zoom until the interview, finding the right virtual platform for levels of users will be paramount.

A more concentrated and intentional effort on those able to participate in the virtual learning can be made while still providing proper assistance for those with technical difficulties. The outreach would require a customer management system (CMS) of some kind for optimal efficacy.

## Conclusion #3

### **Make Energy Trust marketing more approachable for Black business owners.**

Energy is in every facet of residential and commercial property, but there isn't a difference between the utility companies and Energy Trust. Paying the electricity bill isn't glamorous, as it is commonly seen as just another bill. The problem with energy is that it isn't viewed as a company asset and instead as an expense. Almost all the interviewees didn't consider the benefits to doing business with Energy Trust before the interview, but they all wanted more information afterwards.

Ultimately, Energy Trust is a best kept secret within the Black small business community and that needs to change. This will be a heavy lift because it's based on recommendation one.

Black businesses along with other entities have a lot on their plate in addressing their outreach efforts since the beginning of the COVID pandemic. Unfortunately, the pandemic compounded with gentrification for the last 20+ years, Black businesses have needed to change how they conduct their operations which includes technology infrastructure and marketing efforts. This is a good time for those brick-and-mortar businesses who are reevaluating commercial space and overhead expenses.

Being the priority is to keep the doors open with the revolving pandemic regulations, businesses investing in energy with Energy Trust need to have a return on investment sooner than later.

Another approach within the campaign is to embrace volunteers for this heavy lift and potentially other endeavors. For those seeking to reduce the carbon footprint, they can be mentors for the smaller business. As the public entity is seen as the energy authority, an inference of one's opinion suggests the organization is the thought leader in helping with innovative technology, policies, and resources.

## Conclusion #4

### **Energy Trust will need to seek out and follow up with research respondents and provide education.**

An overwhelming amount of the participants in this study wanted to be followed up with. The interviewer asked if a focus group would be of interest, and all welcomed the idea without any declines.

A significant investment in the Black community would start with inviting the interviewees for an in-person focus group. This focus group will take a deeper dive into the questions asked and continue the work from this study. Recommendation #1 building trust throughout their companies could lead to something bigger.

Each one of these companies has specific communities that they serve. Some of these business owners do not know each other because their work doesn't cross or intersect with one another. So even though it may not lead to an immediate Energy Trust business transaction, the opportunity will increase hope and camaraderie amongst the Black business community to build the critical component of trust, which is currently missing.

In fact, most participants cited wanting to set their children and families up for the future as a reason for starting and investing in the Portland-Metro area for business.

## Conclusion #5

**Energy Trust should follow up with developers and real estate landlords who work closely with Black business owners, because COVID-19 has changed the landscape of NE Portland.**

A few of the interviewees' stated their ability to do any improvements heavily relied upon the owner. The majority of Black business owners lease their space and their first point of contact for repairs is their landlord, the property owner. Reaching out to these property owners, especially if they are also Black business owners, could be a good connection to expand the awareness of energy efficiency as a business asset.

# Appendices

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Appendix A: Communication Templates for Potential Interviewees  
Appendix B: Discussion Guide Used in Interviews

# Appendix A: Communication Templates for Potential Interviewees

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## Email Request

Hi [name of respondent],

My name is Nathan Webster. I called earlier today and was given your email. I'm a certified minority business in Washington and Oregon. As I mentioned earlier in my call, the reason for this email is because the Energy Trust of Oregon recently hired me to help the leadership learn more of how to serve Black leaders and businesses, and I put you all on the list to be a contributor.

It's 30 minutes of me asking some questions to help their leadership serve our community better. My goal is to make it a quick conversation, because I know you're busy. When the interview is completed, you will be blessed with a \$50 gift card anywhere of your choosing. Here's the scheduling link: [link].

All smiles,  
Nathan

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## Social Media Request / Text Message

Hey [name]! I'm working on a project the Energy Trust of Oregon recently hired me to help the leadership learn more of how to serve Black leaders and businesses, and I put you all on the list to be a contributor.

It's 30 minutes of me asking some questions. My goal is to make it a quick conversation, because I know you're busy. When the interview is completed, you will be blessed with a \$50 gift card anywhere of your choosing.

If you're interested, let me know and I can send my scheduler. Or, you can lemme know when's a good time.

## Appendix B: Discussion Guide Used in Interviews

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### Business Ownership: (baseline of who they are)

1. How long have you been a business owner?
2. What industry would you consider your business in?
3. What Generation category do you fall in?
  - a. Gen Z (born between 1995-2015): 4-24 yrs. old
  - b. Millennial (born between 1980-1994): 25-39 yrs. old
  - c. Gen X (born between 1965-1979): 40-54 yrs. old
  - d. Baby Boomer (born between 1944-1964): 55-75 yrs. old
  - e. Choose not to say
4. How long have you been an Oregon business?
  - a. 0-2 years
  - b. 3-5 years
  - c. 6-10 years
  - d. 11-20 years
  - e. 21+ years
5. Why did you choose this community?
6. What's your long-term plans for business?

### Operations: (needs assessment of pains and gains)

7. Tell me about your business operations pre-COVID and over the last 12 months?
8. Did you receive business assistance from any organizations – chambers, start-up money or low-interest loans, better business bureau, small business assistance providers like? If yes, which organizations or programs?
9. Do you know how much money you spend annually on energy costs?
10. What do you know about Energy Trust of Oregon's programs for businesses?
11. Have you been able to maximize your square footage profits and savings? (need to know size & ownership/lease)
12. Have you thought about ways to reduce operating costs by changing how you use energy?
13. Do you have any other locations?
14. Do you use subcontractors, employees, or interns? (If so, how many do you use and what is their position-subcontractor, etc.)
15. How do you handle building maintenance? (Outsource, in-house, etc.)
16. How do you decide what equipment to buy? And when to install it? Who installs it? (each industry will vary on season and cost)
17. If interested in learning more about energy efficiency cash incentives from Energy Trust for your business, would you like to be contacted in the future?
  - a. If so, how do you wish to be contact (e-mail, phone, etc.)

### Feedback

18. Is there anything else you'd like to share with me about your business, energy in general, or about Energy Trust?

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