

# Diversity Advisory Council Meeting Notes

July 12, 2023

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## Attending from the council:

Susan Badger-Jones, special projects consultant  
Terrance Harris, Oregon State University  
Indika Sugathadasa, PDX HIVE  
Rhea Standing Rock, Sunlight Solar  
Christopher Banks, Urban League of Portland  
Ruchi Sadhir, Oregon Department of Energy

## Attending from Energy Trust:

Michael Colgrove  
Emily Findley  
Elaine Dado  
Elizabeth Fox  
Ansley Guzynski  
Kate Wellington  
Jennifer Mitchell  
Mia Deonate  
Elaine Prause  
Brigid Gormley  
Michael Hoch  
Natalia Ojeda  
Lidia Garcia  
Emma Clark  
Isaiah Kamrar  
Hannah Cruz

Kathleen Belkhat  
Kenji Spielman  
Themba Mutepfa  
Julianne Thacher  
Marshall Johnson  
Megan Greenauer  
Amber Cole  
Ashley Bartels  
Sletsy Dlamini  
Ryan Crews  
Amanda Thompson  
Sloan Schang  
Taylor Ford  
Debbie Menashe  
Amanda Zuniga  
Alexis Brunelle

## Others attending:

Jessica Dover, AlmaLuna Language  
Services  
Traci Fuller  
Brikky King

Ivonne Saed, Saedgraphic  
Jenny Sorich, CLEAResult  
Alder Miller, CLEAResult

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## 1. Welcome and Introductions

Mike Colgrove, executive director, convened the meeting at 9:01 a.m. The agenda, notes and presentation materials are available on Energy Trust's website at <https://www.energytrust.org/about/public-meetings/diversity-advisory-council-meetings/>.

Mike Colgrove reviewed protocols for available language interpretation services in English and Spanish and directed attendees to select the language they feel most comfortable using. Mike led a round of introductions among the council members and attendees representing Oregon Public Utility Commission.

Mike provided context around this session and how it relates to budget planning. Energy Trust is soliciting input from Diversity Advisory Council members about what the organization should accomplish

in 2024, especially for customers that have been historically left out of clean energy opportunities including communities of color, rural communities and customers with lower incomes.

## **2. Budget engagement deep dive session**

### *Topic summary*

Alanna Hoyman-Browe, project manager, introduced the purpose and format of the deep dive session, which is to connect feedback Energy Trust hears from communities and stakeholders to its budget and planning process.

Alanna reviewed some of the input heard from the council in an earlier session to gather market intelligence. Previously, council members recommended creating more resources to help customers navigate energy funding opportunities that can help with challenges from inflation and rising energy costs. The council also indicated that there is growing interest in energy and climate issues among communities, and Energy Trust should respond by increasing program accessibility, prioritizing weatherization measures and supporting decarbonization goals.

Tracy Scott, director of programs, presented context on why Energy Trust is focused on accelerating energy savings in the coming years. The state of Oregon is requiring Energy Trust's utility partners to meet ambitious emission reduction targets, and energy efficiency is an affordable, reliable and essential tool to do so. Energy Trust sees an opportunity to get more energy savings sooner by broadening program reach and building up infrastructure through strengthening its network of community and trade partners. The overall goal is to pull savings forecasted after 2030 into the current decade, and to do so it is critical to overcome participation barriers to reach new customers.

Isaiah Kamrar, residential program manager, presented an overview of how residential programs may change to reach new customers through a delivery partnership strategy. The program will build on existing partnerships using a collaborative framework and envisions developing a roadmap that potential partners can use to work with Energy Trust to create a holistic, customized set of offers from different programs and sectors.

This model could also help customers tap into multiple sources of funding to maximize results from each project, such as an upcoming effort to leverage Oregon Health Authority's healthy homes grants in support of energy offers with health and safety benefits. Another example is using the existing Community Partner Funding offer as a framework to do longer-term planning with community partners to accomplish strategic goals.

Kathleen Belkhat, commercial program manager, presented on Energy Trust's workforce development strategy to help ensure a robust network of contractors and energy professionals to carry out this work. A dedicated working group of staff was formed to identify current needs and what to focus on in the near-term. Energy Trust has heard from stakeholders that it needs to be more proactive in helping shape the market through creating workforce development initiatives, growing its network of trade ally contractors and building new capacity with community-based organizations.

Market intelligence indicates there is a mismatch between the high interest in clean energy among customers and lower rates of younger workers entering the industry, as well as experienced workers retiring. Energy Trust aims to cultivate interest and desire among younger workers, create training and development opportunities and build individual and business capacity to support energy activity. Current activities include curriculum development, scholarships and fellowships, representation and career fairs and trainings and business to business peer mentorship. Many of these activities are carried out in coordination with other organizations where Energy Trust plays a role or fills a gap. Staff explained that Energy Trust has not traditionally participated in the workforce space and efforts will likely involve continuing to work with other organizations that do this work.

*Discussion***Topic: Delivery partnership strategy and community-centered programs****Who is doing partnerships models well and what makes them successful?**

A council member said that Urban League of Portland has a 78-year history of partnering with more than half of potential stakeholders in the Portland area and expressed appreciation for the residential presentation and its roadmap for how Urban League and Energy Trust could form partnerships. The existing partnership between Energy Trust and Latino Built is another successful example. Urban League partners with Portland Public Schools and with Portland Clean Energy Community Benefits Fund to promote green careers. A best practice for making these partnerships work is good personal relationships that include trust from the funder that the awardee can get the work done well. Another best practice is to build positive awareness around projects through media opportunities, but not at the expense of effectively serving customers. Ultimately, the work should speak for itself (Christopher Banks).

A council member stated that looking more broadly, Nike is a good example of how a company can use their branding to enter community spaces and get a more global reach, which they have done with Oregon State University and University of Oregon. Energy Trust should focus on co-partnering with organizations and events that are recognizable to community members, such as the annual Good in the Hood event in North Portland. Best practices for building good partnerships are to consistently show up and put money toward community needs to show reliability and desire to build a bridge. However, there is no perfect strategy or specific organization doing this best (Terrance Harris).

A council member mentioned Community Energy Project does a good job reaching communities. To be successful, organizations need to possess both technical energy knowledge and staff who understand the lived reality of those they serve. Many organizations have one of these but not both, and Energy Trust should lean on its relationships with communities, contractors and other organizations (Indika Sugathadasa).

The council mentioned that Wallowa Resources is an example of an organization that works in small communities and gets a lot done due to its personal relationships and the continuity of those relationships. Staff do not cycle in and out frequently (Susan Badger-Jones).

A council member agreed that personal relationships are key, and that is something Oregon Department of Energy has been focusing on. For example, it hosted its first Resource Assistance for Rural Environments (RARE) intern in 2023. The program places early career workers in local communities with entities like local governments, tribal governments and community organizations with a focus on serving rural areas. RARE members have different areas of focus, however an increased focus on energy led to the creation of a new cohort for the energy-focused members to share information and increase capacity (Ruchi Sadhir). Oregon Department of Energy is also responding to recently passed legislation directing it to create more resources to help customers navigate available resources by hiring a dedicated community navigator. The navigator will help establish a state program and work more closely with field staff, including at Energy Trust. The program will include a tool to help match funding sources with eligible recipients. Some information requests have a fast turnaround and having established relationships in place make it simpler to exchange information to get answers quickly. Oregon Department of Energy will also create two additional positions to carry out a directive from another piece of legislation to create a one-stop shop for energy efficiency, and it is working with Energy Trust to identify needs and determine how to assemble all available offers for specific energy technologies like heat pumps (Ruchi Sadhir).

The council mentioned a program they participated in about 10 years prior to receive certification from Building Performance Institute and included on-the-job training and an internship placement. The program, a partnership between Native American Youth and Family Center and Verde, bridged cost gaps for participations, such as the \$5,000 cost of the certification itself. While the overall program was successful, some aspects were problematic. The council member appreciated seeing that the models Energy Trust is considering seem to be tapping into realities like ensuring funds are used as intended without favoritism and prioritizing integrity in selecting program delivery partners (Rhea S Rock).

A council member mentioned not hearing of any workforce partners that target the Latino community except LatinoBuilt. That organization could serve as a mentor. It is not about who is doing what, but rather how to get better at serving communities. Conversations have been happening for five years, but each time new ideas emerge groups start from the beginning, which is a waste of resources. A council member expressed having encountered many new organizations across the state through their work in media. Adelante Mujeres is a newer organization doing good work (Oswaldo Bernal).

The council mentioned hearing many mentions of Verde but could not give a good description of what that organization has done. Energy Trust should provide simplified case studies for community partnerships that list the essential elements of each, then look for commonalities to consider when developing potential models. Energy Trust needs to get away from repeated conversations and start putting ideas on the wall (Susan Badger-Jones).

The council discussed the need for shared learning to discover participation barriers. For example, one member recently had to find out avenues to mitigate contamination as part of a project (Indika Sugathadasa). Staff added that capacity-building is an important part of Energy Trust's plan, which could look like offering training and contractor referrals to partners, so they don't have to figure out the energy landscape on their own.

A council member stated it is important to be realistic about what type of workforce is developed in what region. Rural communities need an energy workforce, but not so concentrated that it creates too much competition for businesses to thrive. Small communities often want to keep kids at home, so there is high interest in training for good local jobs that give the option to serve customers right in their community without having to travel far away (Susan Badger-Jones).

### **How should Energy Trust measure our success with building meaningful relationships with communities and partners?**

The council discussed challenges of measuring this type of progress, which is difficult to capture without numerical metrics. With the Latino community, it is hard to use participation data since there are many different communities within that group and overall low awareness of Energy Trust (Oswaldo Bernal). A member suggested part of the answer lies in working with community-based organizations to support a long-range vision. Energy Trust is interested in numerical measurements, but there are other components to the way a vision could be structured. For example, it may include steps that must be completed sequentially and the more energy is incorporated into a long-range vision in the early stages, the more benefit Energy Trust and the community will get (Susan Badger-Jones).

A council member mentioned that when it comes to workforce, program participation may be an incomplete measurement of success because there is no way to know if the participant will continue working in the energy field after completing a program. For that reason, it's also difficult to measure the program's success based on the success of one individual (Rhea S Rock).

The council discussed that Energy Trust should pay more attention to retaining its existing partnerships rather than simply bringing in more. The relationships worked on to keep and build from will be the most

successful, and retention would also increase the value of investments over time (Indika Sugathadasa). Another member agreed, comparison to the effort to keep good existing employees happy to avoid the greater cost of new hires. Assistance to community organizations is often thought of as energy training and education, but some organizations need other types of support to build capacity in skills like small group facilitation or budgeting. Efforts like this would also provide the opportunity to bring together people from different groups and spark new relationships among partners (Susan Badger-Jones).

## **Workforce Development**

The council asked for more information about current workforce development efforts, specifically if there are any new approaches in terms of reaching out to candidates, materials to intrigue diverse candidates or looking outside of Portland to recruit from wider networks (Terrance Harris). Kathleen Belkayat mentioned Energy Trust has a presence at career fairs and maintains a list to ensure the right staff attend each event, but there is opportunity to expand those efforts. Energy Trust's internal recruitment efforts are managed by human resources, but more broadly there are incentives offered for interns to support participation in strategic energy management and there are two Roger Arliner Young (RAY) fellows working at Energy Trust currently. There are many individual approaches across the organization, and the working group is ensuring those practices are consistently being shared and documented. The council added there is opportunity to leverage advisory councils to share hiring opportunities with their networks to reach a wider group of candidates (Terrance Harris).

A council member brought up the value of RARE interns, pointing out they have been working in energy for a long time and often continue working with Energy Trust in other capacities and become valuable, important resources—for example, former board member Lindsey Hardy. Energy Trust regularly contributes funding for RARE positions, but there may be more opportunity to tap into their knowledge and connections after the internship period ends. Energy Trust could also work with University of Oregon to increase diversity among the energy cohort (Susan Badger-Jones). Another member added that they tried to get the RARE member they worked with at Oregon Department of Energy to stay for a second year, but they needed more income despite remaining excited about the opportunity. Energy Trust staff add value by providing mentorship for RARE members and cohorts—for example, this intern was based in Pendleton where Oregon Department of Energy does not have other staff. Energy Trust's eastern Oregon outreach manager worked closely with this RARE member and helped them connect with local entities more efficiently by grouping meetings with local governments and tribes.

### **What should Energy Trust's role be in clean energy workforce development?**

The council discussed that the first step is identifying where the gaps are, such as younger workers who have graduated but seek additional skill sets (Susan Badger-Jones). Another member added Energy Trust should recognize the gaps are often in on-the-ground trade positions. Someone who goes to college and wants to be an engineer will find their path, the challenge now is creating desire and opportunity to work in the trades (Indika Sugathadasa).

The council mentioned that prior to the pandemic, the council engaged with Portland Community College and Energy Trust. One idea that stemmed from this was to get into the education space early in community college, high school or even grade school. Building desire early could help develop the workforce needed in the next five or six years (Oswaldo Bernal).

A council member stated that while apprenticeship programs seem like a great resource, it can be difficult to get into them. For example, they once helped a person get into an electrician apprenticeship however, to be eligible for an associated scholarship, they had to secure a job with an electrician. A younger worker may not know how to navigate the complexities involved with securing a trade job even if their desire is strong (Susan Badger-Jones).

The council discussed that within the Latino community, the workforce is strong but the gig economy may be more appealing, or the candidates may not feel comfortable enough using English to get a job at a company despite having skills and certifications. Energy Trust should explore how to connect workforce opportunities with workers who already have the necessary skillsets but not the language skills (Oswaldo Bernal). Another member suggested creating case studies featuring the energy employment journeys of different people who have achieved success through a given program or channel (Susan Badger-Jones).

#### **How is success measured with this work?**

A council member suggested Energy Trust will need to find success stories in future years (Oswaldo Bernal).

A member commented there is content on YouTube and other channels where users consume building science information. There is an audience and interest, but many don't know how to take the next step to translate that into a career path. Energy Trust should put all available materials—such as trainings and apprenticeship opportunities—related to workforce on its website in one place to make it easier to navigate (Indika Sugathadasa).

The council suggested that Energy Trust could look at the number of participants enrolled in training programs and compare that to what they do afterwards. It could also look at communities that are doing strategic energy planning and are looking for resources to keep kids local with good jobs, such as in tourist economies (Susan Badger-Jones).

A council member shared appreciation that they are not alone in facing workforce barriers, and that solutions are being discussed as a group. Despite possessing degrees, certifications and work experience, it can still be hard to figure out where one belongs in the energy industry. It can also be a struggle to know what opportunities to look for and to describe how experiences match up. A member added that the question of how to measure success is lingering and would like to hear how others feel to help think through that (Rhea S Rock).

A member said it may seem trite, but success can be measured by the number of people who were positively affected and had their lives changed for the better. There may be different measures of success than numbers in a column (Christopher Banks, Susan Badger-Jones).

#### *Next steps*

Energy Trust will host a joint session in October where all advisory council members can hear how this input is reflected in the 2024 draft budget and 2024-2025 action plan. Diversity Advisory Council members are invited to provide a formal public comment on the draft budget.

#### **5. Adjournment**

The meeting adjourned at 11:22 a.m. The next Diversity Advisory Council meeting is scheduled for Tuesday, May 16, 2023. <https://www.energytrust.org/about/public-meetings/diversity-advisory-council-meetings/>.