

## Diversity Advisory Council Meeting Notes

September 19, 2023

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### Attending from the council:

Susan Badger-Jones, special projects consultant  
Oswaldo Bernal, OBL Media  
Terrance Harris, Oregon State University  
Indika Sugathadasa, PDX HIVE  
Rhea Standing Rock, Sunlight Solar  
Christopher Banks, Urban League of Portland  
Dolores Martinez, EUVALCREE  
Rebecca Descombes, NAYA

### Attending from Energy Trust:

Michael Colgrove  
Emily Findley  
Elaine Dado  
Elizabeth Fox  
Bayo Ware  
Melanie Bissonnette  
Andrea Danowski  
Tiffany Hatteberg  
Natalia Ojeda  
Elaine Prause  
Janelle St. Pierre  
Elisa Simko  
Isaiah Kamrar  
Alex Novie  
Tracy Scott  
Hannah Cruz  
Kathleen Belkhayat  
Kate Wellington  
Kenji Spielman  
Themba Mutepfa  
Sue Fletcher  
Helen Rabold

Ansley Guzynski  
Megan Greenauer  
Ashley Bartels  
Jeni Hall  
Kirstin Pinit  
Marshall Johnson  
Adam Bartini  
Alanna Hoyman-Browe  
Chris Lyons  
Emma Clark  
Cameron Starr  
Mia Deonate  
Amanda Thompson  
Sloan Schang  
Taylor Ford  
Maddy Otto  
Maddie Norman  
Ben Thompson  
Amber Cole  
Lidia Garcia  
Debbie Menashe  
Amanda Zuniga

### Others attending:

Henry Lorenzen, Energy Trust board  
Jessica Dover, AlmaLuna Language  
Services  
Rose Miller, NeighborWorks Umpqua  
Robert Whitsell, NeighborWorks Umpqua  
Alex Alonso, NeighborWorks Umpqua  
Marion Powell, Unite Oregon  
Julie Williams, Seeds for the Sol  
Angel Swanson, Beira Consulting

Ivonne Saed, Saedgraphic  
Ciera Milkewicz, CLEARResult  
Lindsey Diercksen, LD Consulting  
Guillermo Castillo, Small Business Utility  
Advocates  
Russ Redinger, Spray-On Foam  
Maria Robinson, CLEARResult  
Jenny Sorich, CLEARResult  
Alder Miller, CLEARResult

## 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 led a round of introductions among the council members and attendees representing Oregon Public Utility Commission and Energy Trust's board of directors.

## 2. Panel discussion: Perspectives from community-based organizations

### *Topic summary*

Mike Colgrove opened the panel by providing context on Energy Trust's community engagement strategy and the importance of expanding its reach through partnerships with community-based organizations that can deliver offers locally.

Bayo Ware and Isaiah Kamrar provided an overview of community partnership offers Energy Trust collaborated on with the organizations represented on the panel, including Community Partner Funding, Working Together Grants and the solar ambassadors pilot. Panelists included Marion Powell, Clackamas chapter co-director with Unite Oregon; Julie Williams, president and founder with Seeds for the Sol; and Robert Whitsell, home repair manager with NeighborWorks Umpqua.

### *Discussion*

**How does your organization work with your community? What does your outreach look like, or how else do you typically connect with clients and customers?**

Marion Powell: As an on-the-ground organization, Unite Oregon has organizers that work with organizations to do one-on-one outreach and share information at community events. Unite Oregon maintains a database of organizations it has made connections with and uses it to distribute information by email. Another way information is shared is through leadership councils; for example, the Clackamas chapter facilitates leadership councils to discuss topics like waste and recycling and renewable energy.

Robert Whitsell: NeighborWorks Umpqua actively engages with local communities in southern Oregon, especially central hubs like Coos Bay and Roseburg. Working with Energy Trust has allowed NeighborWorks Umpqua to expand its outreach into smaller, more rural communities it hasn't had capacity to reach before. It took the opportunity to connect with other community leaders in the central hubs to spread information through word of mouth, which is effective but a very slow process.

With its second Working Together Grant, NeighborWorks Umpqua began seeking even better connections through local events, including those for veterans and at senior centers. The organization receives six to fifteen contacts per day on average, which may be from posts and articles or from service providers like contractors, medical centers and schools. Creating a good, solid standing within the community was essential for people to have an easy way to reach out.

Julie Williams: Seeds for the Sol has worked with the Sustainability Commission in Corvallis to run ads and place content that explain what services it offers. Seeds for the Sol has also worked with City of Corvallis to share its information to community members who have reached out to the city for water assistance, and through a parks and recreation scholarship program that identifies income-qualified customers.

Seeds for the Sol has built strong relationships with installers over time; after first consulting local installers for advice, it is now promoting income-qualified programming and providing referrals to the organization. Programs provide up-front funding for its customers, which are paid back through a zero-interest loan the organization provides. With energy projects like weatherization or solar, Seeds for the

Sol designs the payback plan, so the customer's payments match the expected bill savings from the project. Faith-based communities and school districts also help promote these programs. Local assistance organizations also help refer customers that don't fit the low-income criteria but are not wealthy enough to afford upgrades on their own.

**What steps did your organization need to take to expand your programming to work with Energy Trust?**

Marion Powell: About a year ago, Unite Oregon established a new climate justice pillar and to pursue this new area of work, staff needed to learn about solar technology. Working with Energy Trust staff through the Solar Ambassadors pilot allowed the organization to build capacity quickly using resources like roadmaps and curriculum. Expanding knowledge of solar energy allowed Unite Oregon to carry those learnings back to community members.

Robert Whitsell: Working with Energy Trust over the past two years provided a great opportunity to expand the organization's home energy assessment work and use the additional funding to deal with fundamental challenges like asbestos testing. While the work has been amazing, the biggest challenge was finding a way to step out of piggybacking on other work. NeighborWorks Umpqua typically uses community development block grant funding, which is challenging because it only allows the organization to do about 30 repairs. The organization is just now understanding how to expand that to get more help for people in the communities, especially for those facing extreme temperatures with insufficient heating and cooling. Energy Trust has helped provide new ways of looking at and overcoming those challenges.

Julie Williams: The first thing needed for Seeds for the Sol, which was almost 100 percent volunteer-staffed, was to hire a full-time employee. Another aspect was to increase capacity and knowledge to do outreach with communities of color and address blinders that may come with living in a mostly white community like Corvallis. The organization also needed to purchase new technology such as customer relationship management software to manage its client database, DocuSign software, new computers and a tablet. It also needed to procure translation services while seeking out a part-time employee who speaks Spanish. Energy Trust supported capacity through offering trainings and seminars, and also provided the opportunity to attend Energy Trust sponsored events.

**How does the partnership benefit your organization? Has the experience been worthwhile overall?**

Robert Whitsell: NeighborWorks Umpqua and Energy Trust meet on at least a monthly basis, but sometimes as much as several times a week to talk through challenges. The organization was struggling at the end of the COVID-19 pandemic, but with the assistance of Energy Trust it has opened new doorways and is now functioning at double the capacity it was before the pandemic. It is now looking to expand again by about a third of its current capacity. A continuing challenge is the fact that Energy Trust incentives do not typically cover the full cost of an installation.

Julie Williams: Working with Energy Trust has increased her organization's security, standing behind their efforts to grow and expand. For example, staff have contacts at Energy Trust they can call directly with technical questions about specific home configurations, like in homes that need to piece together heating from differing sources.

Seeds for the Sol and Energy Trust also co-brand collateral for tabling—Energy Trust has resources to create professional-looking materials, which helps legitimize their presence and makes them feel empowered to tell their story. The organization is hoping to expand into Bend in the coming year, which

is due to Energy Trust's support. Seeds for the Sol is also beginning to expand support for local woman- and BIPOC-owned installers using Energy Trust's no- and low-cost incentive models. Seeds for the Sol pays for the installation up front, and then applies for the incentives to backfill the cost. That has allowed installations to happen more rapidly.

Marion Powell: Working with Energy Trust for the past year has allowed Unite Oregon to do more activity to build its customer base, especially in Clackamas. Clackamas county can be hard to organize because of its overall size and diversity of both urban and rural communities, and Solar Ambassadors was a way to bring people together on the idea of renewable energy as well as learn more about the Clackamas community. One person the organization worked with was so excited about their solar installation that they welcomed the opportunity to teach other community members by serving as an ambassador. Working with Energy Trust also brought valuable opportunities to attend conferences, including one focused on Indigenous energy where the Solar Ambassador pilot was presented. The conference was also a chance to learn from other Indigenous communities about efforts to install solar on reservations.

### **What do you see as opportunities to make it easier for organizations like yours to work with Energy Trust?**

Julie Williams: Since there is opportunity for more grants to support personnel and training to help other organizations, the organization is starting to take things from a volunteer-based workforce to having dedicated staff. That can help organizations continue to build in the direction they want to go.

It would be helpful to have a directory of Energy Trust staff who can be contacted directly for specific needs. There is also opportunity for more coaching and teaching about other aspects of energy to branch out into—it can feel like a 10-course meal where there is always more growth available from solar to insulation and beyond.

In addition, the compensation Energy Trust provides for performing home energy evaluations has been as valuable as the added personnel. These evaluations allow for transparency with what is going on in a home so they can give guidance to a homeowner on what upgrades will benefit them.

Marion Powell: With Solar Ambassadors, the organization valued the initial onboarding activities and solar training that brought together all the pilot partners and allowed them to be on the same page from the beginning. There is opportunity to continue having technical documents translated into other languages to ensure non-English speakers remain on par with their counterparts. It will also be helpful to make sure the roadmap resources, including offramps, continue to be clear. Having a consistent base to do outreach among the other solar ambassadors has made things a lot easier, considering Unite Oregon did not have previous expertise in solar energy.

Robert Whitsell: There is opportunity to try to look at the challenges like a contractor would. Energy Trust should continue having discussions with NeighborWorks Umpqua about ways to support staffing and administrative costs because that is a crucial area. As a grant-based organization, NeighborWorks Umpqua is working with a small pool of funding and once that is spent on assisting a customer, it is gone. It would be helpful if Energy Trust offered more incentives that covered the full cost of an installation and if the processing time to pay incentives to an organization or contractor were streamlined. Many contractors cannot afford a delay in getting reimbursed for installation costs.

Mike Colgrove opened the discussion for questions from council members.

A council member asked about how Energy Trust works with or is planning to serve additional communities of color that do not fit cleanly into existing categories, such as Alaskan Native

communities that get information from community organizations rather than reservations (Rebecca Descombes).

Staff explained that Energy Trust has different pathways to identify new partner organizations and deepen existing relationships. On the residential side, staff work with existing community partners on a weekly basis who work across the state and have a sense of representation at a local level. One challenge is to identify community partners who are interested in participating, have capacity to begin working with Energy Trust and see the value of clean energy as complementary to its existing mission. Energy Trust is actively working to build a framework within Community Partner Funding to expand capacity of enrolled organizations to do more in a community. Additional outreach to more communities to understand what their needs are and where Energy Trust could support is needed. It takes time to build relationships, and staff also work to connect people with local resources such as the Portland Clean Energy Community Benefits Fund.

Mike Colgrove suggested it may be helpful for council members to have a comprehensive list of organizations Energy Trust is working with including through Community Partner Funding, the Working Together Grants and Solar Ambassadors. Having access to this list could help the council identify gaps and suggest other potential partners.

A council member expressed enthusiasm for the information presented through the panel, stating that as a member of a Native American community they know how to connect with that community on or off the reservation. The member stated they are interested in the outreach programming that was shared and could use those existing resources to make connections and feed that information into their community (Rhea S Rock).

The council said Energy Trust should consider how it can streamline its information sharing with a new organization to avoid overwhelming them before they are ready (Susan Badger-Jones).

#### *Next steps*

Energy Trust staff will follow up with council members by providing a comprehensive list of partner organizations participating through the offers described in the presentation.

### **3. Legislative session debrief**

#### *Topic summary*

Hannah Cruz, senior stakeholder relations and policy manager, and Natalia Ojeda, policy and outreach specialist, provided a high-level overview of significant activity from this year's state legislative session that intersects with Energy Trust's mission and programs. Of the nearly 3,000 bills introduced in the 2023 legislative session, Energy Trust staff monitored up to 80 bills throughout the session. The legislature passed some policies that will add value to Energy Trust programs and its work to reach customers it has underserved in the past.

Natalia Ojeda provided an overview of diversity, equity and inclusion-related legislation that was passed in the last three years to reflect policy-setting and decisions that intersects with Energy Trust's work.

Staff then reviewed recently passed HB 2531, which prohibits sales and distribution of compact fluorescent lights as of 2024 and other types of fluorescents, like linear fluorescent lamps by 2025. This bill will have an impact over the next two years on Energy Trust's business lighting offers because some current incentives are based on fluorescent bulbs as a market baseline, which removes the rationale to maintain LED incentives. Energy Trust staff is working with Oregon Public Utility Commission staff to assess the impacts on customers, including small businesses, and identify pathways forward.

Updates to existing programs at state agencies include added funding for programs that support residential home upgrades with health benefits, manufactured home replacement and solar with storage. Two bills were passed that increase support for energy resilience planning at the county government level and at the community level.

#### *Discussion*

The council asked whether the legislation promoting heat pump installations signals this technology as a new energy efficiency standard or target (Rhea S Rock). Staff responded that the state wants to encourage consumers and businesses to install heat pumps of a variety of types like electric, geothermal and potentially gas in the future. This reflects the state of federal funding coming in through the Inflation Reduction Act, which includes a lot of support for electrification of homes and heating sources. However, this bill is targeting all commercially available types of heat pumps, not just electric.

#### *Next steps*

No next steps.

### **4. Budget development assumptions**

#### *Topic summary*

Executive director Mike Colgrove provided an update on Energy Trust's budget development and context behind why the 2024-2025 budget has increased substantially from previous years.

Oregon has established aggressive decarbonization goals through climate protection programs and clean energy programs, which require utilities to reduce emissions by 80% by end of 2030 and reduce them to zero by 2040. Portland General Electric and Oregon Public Utility Commission have approached Energy Trust to find out if increased energy savings by the end of 2030 are possible. Energy Trust is exploring scenarios to achieve more savings faster, and these scenarios help staff understand how much energy savings is possible, how to achieve it and what else is needed to acquire it.

To achieve accelerated goals, Energy Trust needs to think differently about its offers, beyond traditional ways of driving the market forward. The organization needs to make it easier for customers to participate in offers, create a more compelling case for them to do so and shift to a multi-year planning and budgeting process.

To reach customers not yet served, Energy Trust is investing in its network of trade allies and expanding a network of delivery partners that work directly with communities. It is also proposing that the Oregon Public Utility Commission adjust avoided cost requirements to increase the amount of energy savings potential that is cost effective.

Building the infrastructure needed to accelerate savings requires up-front investment, which is reflected in the 2024 draft budget. These investments will take time to pay off with increased energy savings, likely in future years.

#### *Discussion*

No discussion.

#### *Next steps*

A more in-depth presentation on the draft budget will be provided at the board meeting on October 11, which council members are invited to attend. On October 12, the joint advisory council meeting will focus on how advisory council feedback is reflected in Energy Trust's draft budget.

### **5. Review council skill matrix and recent application request**

*Topic summary*

Mike Colgrove shared that an opportunity for two or three council members to volunteer to participate in recruitment efforts to fill three vacancies on the council. The volunteers would be involved in reviewing the skills matrix periodically to identify gaps, review applications from prospective members and make recommendations to the full council.

*Discussion*

No discussion.

*Next steps*

More information will be provided via email about this opportunity with a formal ask for volunteers.

**6. Adjournment**

The meeting adjourned at 11:36 a.m. The next Diversity Advisory Council meeting is a joint engagement with the Renewable Energy Advisory Council and Conservation Advisory Council to review Energy Trust's budget scheduled for Thursday, October 12, 2023.