

Diversity Advisory Council Meeting Notes

February 14, 2023

Attending from the council:

Susan Badger-Jones, special projects consultant
Terrance Harris, Oregon State University
Indika Sugathadasa, PDX HIVE
Dolores Martinez, EUVALCREE
Oswaldo Bernal, OBL Media

Attending from Energy Trust:

Tyrone Henry
Michael Colgrove
Emily Findley
Elaine Dado
Elizabeth Fox
Alana Hoyman-Browe
Kathleen Belkhatay
Lori Lull
Kate Wellington
Kenji Spielman
Themba Mutepefa
Steve Lacey
Sue Fletcher
Ashley Bartels
Jeni Hall
Kirstin Pinit
Bayoan Ware
Sloan Schang
Emma Clark
Melanie Bissonnette
Dan Rubado

Mia Deonate
Tracy Scott
Wendy Gibson
Laura Schaefer
Isaiah Kamrar
Art Sousa
Natalia Ojeda
Amber Cole
Scott Clark
Matt Getchell
Shelly Carlton
Debbie Menashe
Lidia Garcia
Gina Saraswati
Sletsy Dlamini
Caryn Appler
Amanda Zuniga
Alexis Brunelle
Thad Roth
Nicole Bebb

Others attending:

Ezell Watson, Oregon Public Utility
Commission
Henry Lorenzen, Energy Trust board
Ron White, BESThq
Christopher Banks, Urban League of
Portland
Shelly Beaulieu, Dragonfly Consulting
Jenny Sorich, CLEARResult
Huong Tran
Ivonne Saed, Saedgraphic
Angel Swanson, Skill Demand

Brock Henry, Portland State University
Kheoshi Owens, Empress Rules consulting
Ellsworth Lang
Victoria Lara, Lara Media
Josh Weissert, Energy 350
Ruchi Sadhir, Oregon Department of
Energy
Vanessa Burchfield, Burch Energy Solutions
Lindsey Diercksen, LD Consulting
Chris Smith, Energy 350
Alder Miller, CLEARResult

1. Welcome and Group Reflection

Tyrone Henry, diversity, equity and inclusion lead, convened the meeting at 9:02 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/>.

Energy Trust staff delivered instruction on how to leverage new interpretation services that allow Diversity Advisory Council attendees to hear meeting content simultaneously in Spanish or English.

Tyrone Henry led a reflection on the work of Granville T. Woods, a Black inventor responsible creating over 60 inventions including telegraph technologies and roller coasters. Members expressed appreciation for sharing this type of content as a reminder of how much isn't known about the societal contributions by inventors of color (Susan Badger-Jones).

Tyrone led a round of introductions among the council members.

2. Update on OPUC Equity Metrics phase two

Topic summary

Tracy Scott, director of energy programs, presented and update on the ongoing effort by Oregon Public Utility Commission (OPUC) to finalize a set of equity metrics for Energy Trust.

In 2022, the OPUC developed four draft equity metrics for Energy Trust to fulfill a requirement as part of House Bill 3141. To do so, they hosted a series of community engagements to inform the creation of the draft metrics, which are currently available for public comment. These equity metrics signal formal support from the OPUC to prioritize outreach activities, including in support of environmental justice communities. The metrics are expected to evolve over time depending on progress and outcomes.

Tracy Scott explained that the OPUC equity metrics are separate and in addition to Energy Trust's Diversity, Equity and Inclusion Plan, which is a living document.

Each draft metric was reviewed, including the estimated baseline spending and program activity associated with each—capacity building, outreach to environmental justice communities, no- and low-cost offers to reduce energy burden and community resilience. Additional engagement opportunities around the metrics, including with advisory councils, were discussed.

Discussion

An attendee asked when the metrics were developed and if an estimate was available for the total rollup cost associated with activities to deliver on the metrics. Staff stated they were developed through a series of four community outreach cafes hosted by the OPUC and led by a consultant. The draft metrics were approved in December 2022. Staff will follow up with the information on estimated cost associated with these activities. A follow up question was asked about how the OPUC would treat Energy Trust's overhead cost. Tracy Scott answered it will be based on performance metrics in 2023 and the total numbers to be considered include administrative overhead.

An attendee asked how to perform an online energy audit. Tracy Scott stated it was available online through Energy Trust's website. Customers who complete the audit answer a series of questions and receive recommendations based on their response, which could include no- and low-cost options.

The council asked if the individual utilities are also subject to this type of metric (Oswaldo Bernal). Tracy Scott answered that Energy Trust has these metrics due to the oversight of the OPUC and is not aware of any utilities that have dedicated equity metrics.

The council asked about the status of ongoing supply chain issues impacting energy projects and if those have been resolved (Susan Badger-Jones). Tracy Scott explained that the issues are specific to individual technologies and are not happening across the board. Continued supply chain issues may cause impacts moving forward, but it is difficult to predict.

Next steps

The OPUC equity metrics are available for public comment until February 16. Energy Trust is currently working with stakeholders to design and roll out a solar with storage offer to support the fourth metric. Energy Trust will continue bringing updates to its advisory councils in 2023.

3. Board discussions on expectations and future of advisory councils

Tyrone Henry, diversity, equity and inclusion lead, and Michael Colgrove, executive director, led a discussion on the future role and purpose of advisory councils. Energy Trust's board recently held a discussion on the role of the three advisory councils, recognizing that the individual councils were established during very different moments in the organization's existence. Board members provided input about their expectations for these councils, and their responses will be used to create a set of recommendations that can help plan for future budget activity. Later in the year, the advisory councils will also be asked to provide input on their expectations around role and purpose.

Discussion

No discussion.

Next steps

The board will continue its series of discussions on the future role of the councils. The Diversity Advisory Council should expect further engagement in 2023.

4. 2023 Budget Engagements

Topic summary

Alanna Hoyman-Browe, project manager, presented a preview of ways advisory councils will be engaged in Energy Trust's budget and planning process in 2023. Stakeholder engagements will take place throughout the year with advisory councils, the board and utilities to collect input to inform budgeting and planning for 2024.

Discussion

No discussion.

Next steps

Energy Trust will engage advisory councils to provide early input on market trends in April, then follow up with deep dive discussions on specific questions and ideas in July. In October, the councils have an opportunity to review the draft 2024 budget, which will reflect input from the previous engagements.

5. Existing buildings equity assessment update

Topic summary

Wendy Gibson, senior project manager, presented an overview of a recent equity assessment performed for Energy Trust's Existing Buildings program. This program serves commercial

businesses of all sizes and includes multifamily buildings. Entities that serve Existing Buildings include program management contractors and subcontractors, community-based liaisons and Energy Trust staff. Current program management contractor TRC utilizes 21 subcontractors, many of which are businesses and community-based organizations certified by the Certification Office for Business Inclusion and Diversity.

Existing Buildings created a diversity, equity and inclusion statement to guide its path toward creating a more equitable program.

One strategy is convening a cohort of community-based liaisons, who work with Energy Trust from a consulting and integration standpoint with the goal of reducing participation barriers. The community-based liaisons have grown in their role and purpose, and recently created a community engagement plan and a set of draft recommendations that are currently being refined. Recent activity includes delivering a survey to Latino-owned small businesses and hosting healing circles for small businesses with owners of color. Future activities are expected to include collecting data on customer demographics and re-designing program forms to be more inclusive.

Because Existing Buildings has not historically served small businesses adequately, the program is working to expand its small business offers. One example is a direct-install lighting offer that has served about 500 businesses, 40% of which were businesses of color. The program also worked with its residential counterparts to explore ways to better serve multifamily housing, which led to developing a no-cost ductless heat pump pilot for lower income customers and a strategic energy management offer for affordable housing.

Existing Buildings is engaged in workforce development activity, which includes placements for recipients of the Roger Arliner Young (RAY) fellowship for recent graduates of color, which aims to increase opportunities for emerging leaders in clean energy fields. Energy Trust is currently hosting two fellows. The program is also developing a K-12 after-school program pilot that would support education in science, technology, engineering and math subjects by creating culturally responsive curriculum on energy topics. It is also exploring a constructing careers program with a residential construction focus for Black high school students.

Discussion

The council expressed appreciation for the education and workforce activities. A member asked about a brief reference to reparations that was mentioned in the presentation (Susan Badger-Jones). Wendy Gibson stated the program hasn't determined what that would look like but is a topic of interest to the community-based liaisons. It could focus on ways to deliver more incentives to communities of color.

An attendee asked how Existing Buildings plans to co-create offers and strategies with communities. Wendy Gibson answered that will be discussed in coordination with the community-based liaisons.

The council asked if the RAY fellowships are available to youth and in rural areas, and if there is an option for Energy Trust to hire fellows as full-time staff later on (Dolores Martinez). Wendy Gibson responded that fellowship is specifically eligible for recent college graduates and does not have specific plans to extend to the K-12 space. However, geographic eligibility is nationwide. The fellowship period is two years and includes the same benefits as a full-time staff member during that time. Energy Trust is exploring ways to continue to fund fellows after that period.

Next steps

Council members are invited to contact Wendy Gibson if they have interest in getting involved with any of the efforts described in the presentation.

6. Results of 2022 customer awareness and participation survey*Topic summary*

Dan Rubado, senior evaluation project manager, presented an update on results from the 2022 customer awareness and participation survey, which is a general population survey of residential customers in Oregon. This survey is focused on collecting data about customer awareness of Energy Trust and program participation levels for different customer groups. Survey results are used to improve program services, customer communications, and marketing and develop a repeatable framework to track trends over time.

Dan presented an overview of the survey delivery strategy. A \$20 incentive was available to participants who completed the survey. Highlights from the survey findings included insights into program participation rates and average bills savings for participating households by race, income level, homeownership, region and building type. Results also uncovered information about customers' life circumstances as it related to their home comfort and energy burden.

Overall results showed an increase in participation levels since 2020 compared to prior years. The survey also validated a dramatic increase in cooling technology in recent years.

Discussion

An attendee asked how Energy Trust might adjust its services or outreach strategy in response to these results. Dan Rubado stated that will be determined by marketing and outreach groups rather than evaluation. Since the results showed the biggest participation gaps among Latino and Indigenous communities, it is anticipated that ways to serve those customers differently will be explored.

An attendee asked if there was an explanation for why participation among Black customers was mostly indirect. Dan Rubado said the results showed Black and Latino residents were more likely to live in multifamily dwellings and be renters compared to other racial groups. Multifamily buildings have been served at relatively high rates through Energy Trust's Existing Buildings program, which benefits tenants indirectly through building upgrades. These benefits for multifamily residents are split among the tenants and it is difficult to identify which measures benefit renters versus the building owner.

An attendee asked if the presentation slides would be available on the website. Dan Rubado said slides could be sent directly to interested attendees.

An attendee asked how many Latinos participated and how many responded in Spanish. Dan Rubado answered overall, 2% of respondents used the Spanish version of the survey and nearly 200 Hispanic or Latino customers responded overall.

Next steps

A final report will be posted on Energy Trust's website in the coming weeks.

7. Announcements

Council members and other attendees shared information on upcoming opportunities.

Bayo Ware, solar project manager, shared information about an upcoming symposium hosted by National Renewable Energy Laboratory. This Solar Energy Innovation Network Symposium is focused on equitable solar adoption and will take place in Denver. This symposium is related to an effort Energy Trust is involved in to increase access to residential solar in the Portland area by recruiting and training solar ambassadors to spread awareness of solar among homeowners of color. Anyone interested in attending the symposium can contact Bayo Ware for more information.

Tyrone Henry shared an opportunity to attend a business exposition that will take place in Beaverton on March 23. Tyrone will connect anyone interested with organizer Ron White for more information.

8. Adjournment

The meeting adjourned at 11:20 a.m. The next Diversity Advisory Council meeting is scheduled for Tuesday, March 14, 2023. <https://www.energytrust.org/about/public-meetings/diversity-advisory-council-meetings/>.