

## APPENDIX 2: Diversity, equity and inclusion

*This appendix provides information on Energy Trust's work to engage and serve customers it has not been successful at reaching in the past – specifically people of color, people in rural parts of the state and people experiencing low or moderate incomes. It covers 2022 activities guided by Energy Trust's current Diversity, Equity and Inclusion Plan and the OPUC's 2022 performance measure on diversity, equity and inclusion. Updates on this work are included in Energy Trust's quarter two and annual reports to the Oregon Public Utility Commission and Energy Trust Board of Directors. Activities designed to reach these customers that fall outside the plan and performance measure are highlighted elsewhere in this report.*

Energy Trust's current Diversity, Equity and Inclusion Plan was finalized in early 2022 and [published on Energy Trust's website](#). It was developed with input from staff, advisory council and board members, stakeholders, utility staff, community-based partners, customers and contractors. Unlike previous DEI plans, which included goals and deadlines to meet those goals, this is a living document that will be updated based on community feedback and lessons learned. It does not have an end date.

The plan comes at a crucial time for Energy Trust. Five years since adopting its first DEI plan to promote equity in its programs and reach more underserved customers, the organization has made significant progress in certain areas. For instance, it met goals related to increasing residential program participation among people of color and completing more projects with BIPOC- and women-owned contracting businesses. Recruiting and hiring of staff members who identify as people of color has also increased in recent years, which was another goal of the previous plan.

But significant gaps in service remain. A 2022 survey of residential customers found White customers continue to receive the largest financial benefits and be the most aware of Energy Trust; homeowners continue to participate at higher rates than renters; and low-income customers are significantly less likely to be aware of Energy Trust. What's more, some of the groups Energy Trust has identified as priority customers were most likely to report being worried about their energy bills, indicating they stand to benefit the most from participating in Energy Trust offers.

The current DEI plan focuses on engaging with customers and communities so that their perspectives drive program design and operational changes within Energy Trust. It includes five goals, each with proposed metrics to track Energy Trust's progress toward achieving these goals (descriptions of each goal, desired outcomes and all proposed metrics are available at [energytrust.org/diversity](http://energytrust.org/diversity)):

1. Increase representation and readiness
2. Shift and sharing leadership and power
3. Increase community capacity and investments in BIPOC, low-income and rural communities
4. Increase transparency and accountability
5. Deepen engagement with people of color, low-income and rural communities

## Community feedback

A first step in implementing the plan was getting feedback on the proposed metrics as indicators of success and whether the DEI Plan as written would focus Energy Trust activities in meaningful areas that serve more customers and communities. Staff held engagement sessions in the fall with representatives from 20 groups:

- An in-person session with community-based organizations in the Portland area plus a one-on-one session with a Portland-based nonprofit serving people with low income
- A virtual session with community-based organizations working outside of Portland and in rural parts of Oregon
- A virtual session with Energy Trust's Tribal Working Group that is made up of tribal members
- One-on-one sessions with three workforce development groups that work with contractors and tradespeople of color

Four major themes emerged from these engagements.

**Partnerships and collaboration** Session participants stressed that Energy Trust can't just market its offers and services, it has to interact with people in ways that are accessible and applicable to the community in order to build trust (feedback received at the Portland session). They encouraged Energy Trust to continue to partner with community-based organizations, specifically those that serve people experiencing lower incomes and culturally specific community-based organizations that engage young people (Portland). These organizations have insights and deep connections with their communities (rural). Given capacity constraints, community partners often need financial support from Energy Trust to engage in a meaningful way that ultimately boosts program participation (Portland). In addition to financial support, Energy Trust can further support community partners by developing content and curriculum on clean energy concepts as resources.

Overall, the DEI plan needs more details specific to tribes (tribal). Housing authorities can be a valuable partner to reach residential tribal customers and identify homes that are eligible for programs. Each tribe and its housing authority have different needs and resources, so Energy Trust should build on existing relationships to better understand those unique needs (tribal).

**Removing barriers** Some potential customers may feel reluctant to engage with Energy Trust offers and services when they find the available information to be confusing or when it takes too much time to learn about all the options (tribal, Portland). Energy Trust should hold listening sessions to learn about what communities know and do not know and learn how Energy Trust can communicate more clearly to communities about clean energy (Portland).

Barriers to receiving Energy Trust services seem to be less prominent in White communities. Outreach needs to be designed to reach more communities of color and people with low income (rural). Information must be available in Spanish (Portland, rural).

**Diversifying contractor network** Education should be a focus and a more tangible part of the plan. There are contractors and individuals who want to get into the clean energy space but need resources and support to make the transition (workforce).

Requiring businesses to be certified by the state's Certification Office for Business Inclusion and Diversity (COBID) should not be the main indicator or an indicator at all to measure success in the plan. The requirements to get certified do not align with the goal of representing a variety of perspectives and approaches in owning and supporting diverse businesses (workforce). Instead, the focus should be helping businesses owned by women, people of color and service-disabled veterans get COBID certification-ready (Portland). Additionally, providing a self-identification pathway for trade allies who can't or don't obtain COBID certification would benefit many businesses owned by people of color, especially Latinos (workforce).

**Indicators of success** Participants suggested Energy Trust collect data on growth among businesses that receive Energy Trust support to demonstrate the impact on their business development (Portland) and tracking the ownership and size of businesses that participate (workforce). Additionally, there should be a metric on investments in business development, such as worker training, scholarships or other support that helps a business grow (workforce). Last, they suggested there should be a metric related to Energy Trust's internal hiring and staffing (Portland).

## **Next steps**

Informed by this feedback, Energy Trust staff will update the metrics in the DEI Plan in 2023. Once the metrics have been updated, staff will work with internal and external stakeholders to determine which indicators are most beneficial to begin tracking and reporting on in 2023.

Energy Trust staff will continue to capture and share insights from community engagements on an ongoing basis to inform program and organizational planning.