

Diversity Advisory Council Meeting Notes

September 10, 2024

Attending from the council:

Indika Sugathadasa, PDX HIVE
Dolores Martinez, EUVALCREE
Susan Badger-Jones, special projects consultant
Martin Campos-Davis, Oregon Human Development Corporation
Oswaldo Bernal, OBL media
Terrance Harris, Drexler University

Attending from Energy Trust:

Alicia Moore	Alex Novie
Emily Findley	Themba Mutepfa
Elizabeth Fox	Cameron Starr
Elaine Dado	Kirstin Pinit
Mia Deonate	Julianne Thacher
Elaine Prause	Abby Spegman
Amber Cole	Jackie Goss
Caryn Appler	Emily Estrada
Greg Stokes	Tracy Scott
Lizzie Rubado	Hannah Cruz
Gloria Gunn	Gemma DiMatteo
Barbara Miller	Adam Bartini
Jacob Dowell	Erin Roach-Alberts
Alicia Li	Amanda Zuniga
Karen Chase	Akanksha Rawal
Laura Schaefer	Kenji Spielman
Angela Clayton Schmidt	Lindsey Diercksen
Jane Hammacker	Cody Kleinsmith
Julie McMorine	Michael Hoch
Jonathan Cresson	Andi Nix
Chip Polito	Maddie Norman
Emily Cahill	

Others attending:

Ezell Watson, Oregon Public Utility Commission	Christina Zamora, Klamath and Lake County Community Action Services
Benedikt Springer, Oregon Public Utility Commission	Ciera Milkewicz, CLEARResult
Lauren Rosenstein, Oregon Department of Energy	Eathen Swain, TRC
	Ryan Robison, Skill Demand
	Jessica Dover, AlmaLuna LLC
	Ivonne Saed, Saedgraphic

1. Welcome

Alicia Moore, Energy Trust's director of DEI services, 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/>.

Alicia reviewed the agenda and provided a reminder about an upcoming joint advisory council meeting on October 10, which will be used to review Energy Trust's multi-year budget planning cycle in 2025.

2. Draft 2025-2030 Strategic Plan

Topic summary

Staff presented on Energy Trust's draft 2025-2030 Strategic Plan, which Energy Trust is inviting public comments until September 20. Staff reviewed the development process the board of director used to inform the draft plan – which included public meetings, listening sessions with stakeholder, community and customer audiences and a series of staff-developed learning papers – and elements of the plan. Staff then walked through the plan's five focus areas in more detail, emphasizing the focus area focused on creating greater impact for priority customers; Energy Trust needs to rethink and redesign offers to better serve these customers, including through leveraging additional funding sources.

The new strategic plan will directly inform the development of Energy Trust's 2026-2030 multi-year plan that will operationalize the strategic plan by outlining the activities to make progress in each focus area. Energy Trust will continue to track on other existing metrics such as OPUC performance metrics and equity metrics.

Discussion

Staff then facilitated an activity with the council members, who were prompted to add their initial impressions and feedback on the draft strategic plan to an online Mural board. Members added their comments via in response to question prompts regarding the strategic plan, including if anything is missing from the draft plan, what they found exciting about it and how the focus areas may intersect with work in their own organizations or communities.

Staff led a verbal discussion. The council asked, regarding focus area 1, how all customers would see a cost reduction in the near future (Terrance Harris). Staff answered that if a customer directly participated by installing a clean energy upgrade in their home or business, they would see an immediate impact on their utility bill. While this focus area is intended to speak more to lower costs for all customers over time, each time a customer participates, it improves utility systems, which all customers benefit from. Longer-term cost savings are unlikely to be seen right away, but the other focus areas are designed to supplement that objective by focusing on reaching all customers and getting them to directly participate to see immediate bill savings.

The council offered an example of how customers could overestimate the impact of clean energy investments on their utility bills (Oswaldo Bernal). When he installed solar panels on his home, he was not initially aware of potential future costs—for example, if the roof needs to be replaced after the panels are installed, the customer will need to pay to reinstall the solar system afterwards. He stated that a friend who installed solar before getting his house appraised learned that his investment would not significantly improve his home's equity. Staff agreed there is a need for consumer education to ensure customers are not negatively impacted by their energy investments.

Another education opportunity is to help customers better understand if and how energy upgrades will increase the value of their home. The council noted utilities often have a monopoly within a given service area, so customers lack choice and have no control when rate increases occur (Oswaldo Bernal). The council supported being proactive with consumer education to help customers avoid scams, noting the potential for scams related to Solar for All offers in development, which are likely to hit the market in 2026 (Lauren Rosenstein).

The council also emphasized the importance of figuring out how to work with community-based organizations and community action agencies in a mutually supportive way that does not overburden them (Lauren Rosenstein).

Next steps

Council members are invited to contribute more feedback through the formal public comment process by email, mail or an online web form.

3. Klamath & Lake Community Action Services

Topic summary

Christina Zamora, executive director of community action services in Klamath and Lake counties, provided an overview of her organization's work serving low-income customers in Southern Oregon. Klamath and Lake Community Action Services recently celebrated its 20-year anniversary. It is the only community action agency in Oregon that does not administer the weatherization assistance program; instead, those services are provided through Oregon Human Development Corporation. The agency has 22 team members and an annual budget of \$8 million. It focuses on building partnerships with other organizations in its service area to improve awareness of programs, share information and participate in outreach events. It currently manages about 60 relationships with the goal of maintaining those while building new ones.

The largest program offered by the agency is its energy assistance program; a large portion of program participants are on a fixed income. The program takes applications during specific windows in the heating and cooling seasons depending on available budget. Priority access is given to households with senior citizens or disabled customers. The agency has received support from two AmeriCorp RARE members in the past two years to build an energy-specific resource guide that is now available on the agency's website and create efficiency by combining a housing coalition group and an energy coalition group that were previously being managed separately, which increased awareness of the connections between housing and energy.

The agency has also begun working with Lake County Resources Initiative in a collaboration to deliver Oregon Community Heat Pump Program.

Discussion

Alicia Moore asked how the agency approaches its partnerships without creating a burden on either side. Christina answered they work to figure out commonalities with the other organization to avoid creating extra work. Since resources are so thin in their service area, people are often motivated to partner because it feels like sharing a common burden. Being transparent about time commitments and capacity is also helpful.

Next steps

None.

4. Tribal working group update

Topic summary

Outreach staff provided updates on Energy Trust's tribal working group that includes tribal members. It advises Energy Trust strategies for outreach and coordination with tribal customers to increase Energy Trust's knowledge of tribal communities and increase their participation in energy programs. Among the group's recommendations:

- Energy Trust should consider developing more tribal success stories and use storytelling to help tribal communities learn from each other, and to create those assets in collaboration with tribal participants.

- Energy Trust should develop a process for directly engaging tribal leadership bodies and boards that is more strategic, rather than at the project level. We should also think through the administrative burden associated with tribal participation in energy programs and do more to develop an understanding of how this might look different for each tribal community.
- Tribal communities may have concerns about sharing information with Energy Trust, stating we need to advance our work with sensitivity and understand that trust needs to be built over time.
- Energy Trust is hiring a tribal government and stakeholder relations manager; based on feedback from working group and other stakeholders, this person will be part of the internal policy services group and supported by regional outreach staff.

Members have expressed interest in learning about Energy Trust's effort to develop a program-wide strategy to better serve tribal customers. They are also interested in opportunities from new federal funding sources, so staff delivered a presentation on forthcoming HOMES and HEAR programs as they relate to tribal communities.

An effort to recruit more tribal members to the working group is close to completing. The effort prioritized having representatives from all nine federally recognized tribes in Oregon; participation is also open to members of non-federally recognized tribes, tribes outside of Oregon, representatives of tribal organizations as well as tribal liaison positions at other organizations.

Discussion

None.

Next steps

Council members are invited to reach out to staff if they would like to stay connected to or get involved in this work.

5. Innovation and Development update

Topic summary

Innovation and Development team staff gave an overview of Energy Trust's work to identify and leverage new, complementary funding sources. Historically, Energy Trust has been funded by utility ratepayers; more recently, it has added new sources of funding through grants and contracts. Complementary funding allows Energy Trust to serve more customers and more deeply serve customers with lower incomes. It can also provide an opportunity to address other types of housing repairs that may be needed before installing an energy upgrade, such as a roof repair. Complementary funding can also help Energy Trust experiment with new services that are not currently feasible with utility funding only, such as serving customers in geographic areas not served by an investor-owned utility.

Energy Trust's strategy for identifying and assessing complementary funding is:

- Opportunities should be closely tied to our core work and be complementary to existing clean energy efforts that benefit roughly similar customers and communities.
- Another consideration is whether Energy Trust is uniquely qualified to deploy a funding source, because we want to avoid taking opportunities away from organizations that are better positioned to get dollars into communities.

Examples of complementary funding sources included in Energy Trust's 2025 budget including Solar for All, HOMES and HEAR, Oregon Community Heat Pump Deployment program, a FEMA community energy resilience grant and an EPA climate pollution reduction grant.

Discussion

The council expressed appreciation for the attention to rural areas that are not served by an eligible gas or electric utility, stating those are tough to serve (Susan Badger-Jones). Energy Trust is tracking at least 50 possible funding sources, some of which are related to rural and remote areas, however we are exploring those in collaboration with local organizations.

The council said it would be helpful to get periodic updates on new funding opportunities (Susan Badger-Jones), suggesting a quarterly roundup of opportunities would be useful (Martin Campos-Davis).

Next steps

Energy Trust will begin sharing quarterly updates on new funding opportunities with council members.

6. Member updates and adjournment

Alicia Moore reviewed the draft advisory council meeting schedule for 2025. The meeting adjourned at 11:14 a.m.