

# APPENDIX 2: Diversity, equity and inclusion

This appendix to Energy Trust's Quarter Two 2023 Report to the Oregon Public Utility Commission and Energy Trust Board of Directors provides information on progress to meeting the goals identified in [Energy Trust's Diversity, Equity and Inclusion Plan](#). The purpose of Energy Trust's DEI Plan is to ensure customers who have historically been underserved by Energy Trust's programs or who have not directly benefitted from clean energy solutions have meaningful and equitable access to Energy Trust services. This includes but is not limited to people of color, people with low incomes and people living in rural areas.

The plan has five goals and describes desired outcomes for each goal to describe the future state Energy Trust hopes to achieve. In 2023, staff identified metrics to track progress to meeting these goals and outcomes for 2023. Staff previously sought feedback from external stakeholders and community members on possible metrics and used their insights to arrive at the ones included in the plan.

The DEI Plan identifies multi-year goals, and the 2023 metrics tell only part of the story. They are not intended to demonstrate Energy Trust's comprehensive efforts to realize all the desired outcomes associated with each of the DEI Plan goals, although they provide insights into some portion of Energy Trust's DEI efforts. As Energy Trust's activities evolve based on community engagement, and as its capabilities and approaches to tracking data improve, metrics and reporting may evolve too to become more robust and tied to emerging areas of focus.

## Goal 1: Increase Representation and Readiness

### Outcomes:

- Diverse perspectives and ideas contribute to the creation of equitable solutions to support all communities in realizing the benefits of clean energy solutions.
- Energy Trust has significant resources for BIPOC, low-income and rural community organizations, individuals and businesses to engage with Energy Trust as a form of restorative justice to address the historical disparities in investment in these organizations by Energy Trust since our inception in 2002.
- Energy Trust staff engage diverse communities in a respectful, effective and culturally relevant and responsive manner.

### Metric:

- Number of cultural awareness trainings and events attended by Energy Trust staff.

### Status as of Q2 2023:

- In a survey, staff members self-reported collectively attending about a dozen voluntary cultural awareness trainings and events from Jan. 1 to June 30, 2023. These included:
  - a training hosted by Common Spark Consulting to learn how racism impacts energy program work and strategies for equity in program/policy development
  - a Northwest Native Chamber networking luncheon to learn about tribal participation in developments and local government
  - an Ecotrust training on how green energy projects can disregard tribal land rights and community needs
  - a Jewish Family and Child Services meeting to learn about social work services provided to disadvantaged communities and aging populations
- Energy Trust outreach staff attended various events in the first half of 2023 aimed at increasing cultural awareness and connections with diverse groups, including the South Coast Diversity Conference in

North Bend, the Latino Health Equity Conference in Portland, the NW Tribal Clean Energy Summit in Tualip and several Juneteenth events in the Portland area.

- At an all-staff meeting in March, staff heard from LaNicia Duke of the Black Rural Network about her experience as a Black person moving to rural Oregon.
- Energy Trust's DEI Book Club hosted three discussions in the first half of 2023. Seven people attended a discussion on the book "Caste: The Origins of Our Discontents" in March, which compares American racism to caste systems around the world. Ten people attended two discussions on the miniseries "The 1619 Project" in April and May on how slavery and its legacy are at the center of the American experience.

## Goal 2: Shift and Share Leadership and Power

Outcomes:

- Community members have influence in the design and implementation of Energy Trust programs to serve historically underserved communities.
- Communities and community-based organizations have significant ownership and agency in identifying and delivering responsible clean energy solutions co-created with Energy Trust.

Metric:

- Number of community members who participated in Energy Trust projects, initiatives or advisory groups to provide input and influence program design. A community member is defined as a person who is not Energy Trust, Program Management Contractor or Program Delivery Contractor staff. (Community members may be compensated for their participation.)

Status as of Q2 2023:

- As part of the Solar Ambassadors pilot to recruit and train community members to promote solar energy, Energy Trust engaged nearly 100 households on the benefits of solar, cost considerations and the process of purchasing and installing it. In post engagement surveys, participants reported being interested in the environmental and financial benefits of solar but that upfront costs and lack of affordable financing made it inaccessible. This feedback is informing Energy Trust offers going forward.
- The Existing Buildings program incorporates community feedback into the program design through a network of six community-based liaisons, who engage with small business owners and represent their feedback to staff. Liaisons' outreach activities in the first half of the year focused on conducting culturally responsive events and hosting quarterly engagement sessions in English and Spanish with two cohorts of about 20 BIPOC small business owners.
- Four community members serve on Energy Trust's Tribal Working Group, which meets regularly with outreach staff and the OPUC tribal liaison to provide input on outreach strategies that will provide greater benefits to tribal customers and increase program participation. (A fifth member of the group is also an employee of an Energy Trust contractor.) In 2023, working group members established and developed group agreements and participated in program learning sessions.
- Nine people serve on the Diversity Advisory Council, which this year has provided feedback on a customer survey's results and methodology; an equity assessment by the Existing Buildings program; and considerations going into Energy Trust's budgeting for 2024. Two council members also participated in a hiring panel and a review of proposals for an evaluations contract.

## Goal 3: Increase Community Capacity and Increase Investment in BIPOC, Low-income and Rural Communities

### Outcomes:

- Energy Trust contracts with a broad diversity of businesses to support our work and represent a variety of perspectives and approaches.
- Our Trade Ally Network reflects a broad diversity of businesses to better serve all of Energy Trust's customers.
- Energy Trust supports career and business development initiatives that help BIPOC, rural, and low-income community members access career development and business opportunities in energy efficiency and renewable energy.
- BIPOC, low-income and rural communities receive focused investments of Energy Trust's technical expertise and funding resources to ensure programs and services are deployed equitably to all customers.

### Metric:

- Percentage of expenditures to subcontractors on contracts over \$100,000 paid to businesses certified by the Certification Office for Business Inclusion and Diversity as a Minority Business Enterprise, Women Business Enterprise, Service-Disabled Veteran Business Enterprise or Emerging Small Business.

### Status as of Q2 2023:

- From Jan. 1 to June 30, 2023, 33% of expenditures to subcontractors on contracts of more than \$100,000 went to Emerging Small Businesses, 37% went to Women Business Enterprises, 38% went to Minority Business Enterprise and 0% went to Service-Disabled Veteran Business Enterprises. Businesses that qualify for more than one certification are counted in every program in which they are certified.
  - Energy Trust uses certifications from Oregon's Certification Office for Business Inclusion and Diversity (COBID).
  - Under Energy Trust's [supplier diversity policy](#), contracts to non-COBID firms for more than \$100,000 must pay at least 20% of the value of the contract to a COBID-certified firm or firms (including subcontractors).

## Goal 4: Increase Transparency and Accountability

### Outcomes:

- Communities and organizations understand how their input and involvement impacts our work.
- Energy Trust is a learning organization where accountability is based on learning from both successes and failures, which are acted on to improve future outcomes.

### Metric:

- Energy Trust exceeds its 2023 [Oregon Public Utility Commission performance measure on equity metrics](#).

### Status as of Q2 2023:

- The OPUC set equity metrics for Energy Trust in 2023 as part of its annual performance measures for the organization. Energy Trust will report on outcomes in its 2023 Annual Report to the OPUC, which

will be submitted in April 2024. Throughout 2023, staff is providing narrative updates on activities that support these metrics in its quarterly reports (see Section III). While Energy Trust's DEI goals and the OPUC equity metrics overlap in their goals and the data that is being tracked, the OPUC's equity metrics clarify the minimum expectations for Energy Trust. Similar to other performance measures set by the OPUC related to energy savings and customer satisfaction results, staff seeks to exceed this minimum.

## Goal 5: Deepen Engagement in BIPOC, Low-Income and Rural Communities

### Outcomes:

- Energy Trust has developed the relationships and communication channels needed to continuously understand the evolving needs of communities that have been underserved by Energy Trust in the past.
- Communities have confidence in Energy Trust as an organization that will work collaboratively and in good faith to reach mutual goals, according to the communities' desires and needs.

### Metric:

- Number of community engagement activities planned for 2023 and results from those completed engagements.

### Status as of Q2 2023:

- Energy Trust is conducting or has completed 23 engagement activities in 2023. Many engagements involve long-term or ongoing partnership or collaboration with community-based organizations that serve residential and business customers and contractors Energy Trust is trying to reach. Energy Trust's 2023 Annual Report to the OPUC will provide more information about these engagements and outcomes.