

APPENDIX 3: Diversity, equity and inclusion

This appendix to Energy Trust's 2024 Annual Report provides information on progress to meeting the goals identified in [Energy Trust's Diversity, Equity and Inclusion Plan](#). The purpose of the 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. 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 plan identifies multi-year goals, and the 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 goals, although they provide insights into some portion of Energy Trust's 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 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 in 2024:

- Staff members self-reported collectively attending more than a dozen voluntary cultural awareness trainings and events in 2024. These included:
 - NW Native Chamber's NW Native Economic Summit to learn about challenges facing Tribal communities and Tribal governments and how they are implementing housing, workforce energy and business enterprise activities
 - a tour of the lower Albina neighborhood in Portland hosted by Albina Vision Trust to learn the history of the historically Black neighborhood and the future vision for restorative redevelopment
 - a training hosted by Common Spark on creating inclusive environments and communications
 - Urban League of Portland's Equal Opportunity Day Dinner to learn about Urban League priorities
 - a training hosted by The Next Door Inc. on communities experience unequal access to energy efficiency programs due to language barriers, financial constraints or lack of trust in institutions
 - American Council for an Energy-Efficient Economy conference sessions on how energy efficiency programs across the country have applied diversity, equity and inclusion principles to better serve customers

- a multicultural marketing conference hosted by the Association of National Advertisers on connecting with Latino/Hispanic and Black audiences
- Native American Youth and Family Center's annual gala to learn about issues facing the community and meet with advocates
- the Eastern Oregon Economic Summit focused on rural community needs including Tribal economic development
- a gathering hosted by Lake County Resources Initiative and Sustainable Northwest to connect community organizations serving rural Oregon
- Coalition for Communities of Color's Summer Soiree to connect with people and organizations serving communities of color in the Portland area
- South Coast Equity Coalition's annual South Coast Diversity Conference
- Affiliated Tribes of Northwest Indian's 2024 National Tribal Leaders Climate Summit
- Energy Trust outreach team attended dozens of events throughout the year hosted by other organizations to connect with diverse groups; many events were focused on environmental justice communities. Events included Affiliated Tribes of Northwest Indians' annual conference and Changing Currents Water Summit, Confederated Tribes of the Umatilla Indian Reservation's community picnic, Latino Community Association's Latino Fest, Multicultural Fair in Medford and Reclaiming Black Joy events in Multnomah County.

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 in 2024:

- Twelve people serve on the Diversity Advisory Council. In 2024, the council provided input to inform Energy Trust's 2025-2030 Strategic Plan and transition to multiyear planning, the 2025 budget, an assessment of current diversity, equity and inclusion activities and reporting, use of the Tribal Working Group and use of complementary, non-ratepayer funding to support priority customers. Three council members also participated in reviewing Working Together Grant proposals, proposals for an evaluations contract and consulting for an evaluation.
- Four community members serve on Energy Trust's Tribal Working Group, which meets regularly with Energy Trust staff to provide input on strategies that will provide greater benefits to Tribal customers and increase program participation. In 2024, working group members provided input on Energy Trust's 2025-2030 Strategic Plan, the position description and recruiting for a Tribal government and stakeholder relations manager, and Community Partner Funding opportunities with Tribal organizations.

Goal 3: Increase community capacity and 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 in the calendar year made to subcontractors on contracts over \$750,000 (i.e., large contracts) that are certified as minority-owned businesses, women-owned businesses, emerging small businesses and/or veteran-owned small businesses.

Status in 2024:

- 25% of payments made to prime contractors on large contracts have gone to certified subcontractors. The percentage of dollars paid to certified subcontractors in each category is: 12% to minority-owned businesses; 12% to women-owned businesses; 10% to emerging small businesses; and 0% to veteran-owned small businesses.
 - Energy Trust uses certifications from Oregon's Certification Office for Business Inclusion and Diversity and the federal Small Business Administration.
 - In 2023, Energy Trust reported on contracts over \$100,000. The change to contracts over \$750,000 reflects changes to [Energy Trust's supplier diversity program](#), which requires prime contractors on large contracts pay certified subcontractors at least 20% of the total value of the contract.
 - In 2024, Energy Trust added a prime contracting program for all contracts over \$10,000 to track dollars awarded to certified businesses beginning in 2025.

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 2024 Oregon Public Utility Commission performance measure on equity metrics.

Status in 2024:

- The OPUC set equity metrics for Energy Trust in 2024 as part of its annual performance measures for the organization. These are 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.
- Energy Trust met or exceeded all four equity metrics including those on support for nonprofits serving environmental justice communities; targeted outreach to environmental justice communities; and solar and solar + storage projects for customers with low and moderate incomes. For more information, see Section III of Energy Trust's 2024 Annual Report to the OPUC.

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 2024 and results from those completed engagements.

Status in 2024:

Energy Trust community engagement activities range from one-time events to long-term relationships with organizations based in and serving specific communities. In 2024, programs and outreach staff engaged in ongoing relationship building with communities and organizations, such as APANO, Hacienda CDC, Ethiopian and Eritrean Cultural and Resource Center, Seeds for the Sol, NeighborWorks Umpqua, Lake County Resources Initiative and Euvalcree. Staff also began holding monthly meetings with community-based partners that participate in Community Partner Funding to deliver higher incentives to priority customers. Regular meetings are a way for Energy Trust to remain connected with partners and learn from their experience on an on-going basis; meetings are also a time for partners to share information and strategies for serving clients with one another.

Also in 2024, Energy Trust outreach and program staff, along with field staff of its Program Management Contractors and Program Delivery Contractors, attended more than 400 events to connect with customers and communities across our service area. These included community celebrations, resource fairs, conferences, trainings, workshops, business forums and networking events. One-time events are often part of ongoing engagement efforts and relationship building with a specific community.

Outcomes of community engagements are unique to each activity. In many cases, lessons from community engagement inform continuous improvements to delivery of services. Through all kinds of engagements, we are able to:

- listen and learn about concerns for our priority customers and communities
- connect more deeply with municipalities, government entities and local leaders
- learn principles and practices to build and maintain trust with Tribes, including policies around energy on Tribal lands
- learn about new programs and how to resource projects in specific communities

- gain new perspective from those who work with Energy Trust on how we may be able to work better together in the future
- identify workforce development opportunities and how Energy Trust can fill to encourage more qualified workers entering the field