

Energy Trust of Oregon



2021 Diversity, Equity and Inclusion Operations Plan

Energy Trust is dedicated to helping utility customers in Oregon and Southwest Washington save energy and generate renewable power. We are committed to providing cost-effective, sustainable energy-efficiency and renewable energy solutions to all those we serve.

In December 2017, Energy Trust's Board of Directors substantially revised its Equity Policy, expanding the policy to become a Diversity, Equity and Inclusion Policy. The policy sets forth the board's expectations for Energy Trust to operationalize its vision of ensuring service to all customers. It calls for focused program design, monitoring and reporting on results with respect to serving all Energy Trust customers, especially those who may be underserved by Energy Trust programs, specifically rural, low-to-moderate income customers and communities of color.

To operationalize this vision, the board's policy called for maintenance of a diversity, equity and inclusion operations plan¹ that:

- includes goals, objectives and activities
- assesses and measures progress
- learns from mistakes and successes
- shares progress publicly on no less than an annual basis

About the Diversity, Equity and Inclusion Operations Plan

In 2017, Energy Trust staff engaged in a more than six-month planning process in which members of Energy Trust's diversity, equity and inclusion committee, a cross-functional team of staff, and Energy Trust leadership discussed concepts and vetted information with internal work groups to inform the plan's development. This work was guided by Dani Ledezma, an outside consultant with experience in organizational diversity, equity and inclusion development. Board members, Oregon Public Utility Commission staff, community leaders, and diversity, equity and inclusion professionals were also engaged to help craft and revise the plan and goals.

¹ The policy also requires Energy Trust to "establish a Diversity Advisory Council to provide advice and resources to the board of directors to support Energy Trust's diversity, equity and inclusion operations plan and to advise the board of directors on assessing and measuring progress toward goals of such plan."

In early 2018, Energy Trust’s executive director, Michael Colgrove, launched the Diversity, Equity and Inclusion Operations Plan that outlined 10 goals for the period of 2018-2020.

Described in more detail below, the Diversity, Equity and Inclusion Operations Plan for the period 2018-2020 will be extended for an additional year through 2021. A cross functional project team convened over this past spring and summer to propose new goals for the coming year, and those goals are described below.

Diversity, Equity and Inclusion Operations Plan Goals 2018-2020

Energy Trust’s core purpose is to help utility customers—people and businesses—invest in and benefit from low-cost energy efficiency and clean renewable energy. Because we view diversity, equity and inclusion as critical to expanding participation in our programs and achieving our core purpose, we established the following 10 measurable diversity, equity and inclusion goals to achieve by the end of 2020.

We engaged first in data baselining, which resulted in the Energy Trust 2018 Diversity, Equity and Inclusion Data and Baseline Analysis (the “DEI Data Baseline Analysis”).² The DEI Data Baseline Analysis examined Energy Trust program participation across each of the census tracts in Energy Trust’s service territories in Oregon. Using demographic indicators describing census tracts along the three dimensions of Energy Trust’s definition of diversity—rural, household income and racial diversity—the DEI Data Baseline Analysis assigned a 1-5 ranking to each census tract with 1 being the lowest and 5 being the highest. In addition, the DEI Data Baseline Analysis provided a composite score of all three diversity dimensions to each census tract.

The DEI Data Baseline Analysis is based primarily on data from the U.S. Census bureau and as such has limitations. It is comprehensive work but also requires additional validation and refinement with other data sources.

Notwithstanding its limitations, the DEI Data Baseline Analysis was the basis for the Diversity, Equity and Inclusion Operations Plan, and for 2021, most of the goals and targets relating to Energy Trust’s energy-efficiency and renewable generation programs are tied to baselines identified through this work.³

We have tracked and monitored progress, reporting twice annually in Energy Trust’s public reports to the Oregon Public Utility Commission. The most recent report on progress is contained in Energy Trust’s 2020 Q2 Report to the Oregon Public Utility Commission.

The goals in the Diversity, Equity and Inclusion Operations Plan for 2018-2020 were:

1. Increase customer participation in energy-efficiency programs for all underserved populations by 20% by the end of 2020, with strategies and sub-goals for residential, commercial and industrial sectors.
2. Increase customer participation in renewable energy programs for all underserved populations by 20% by the end of 2020.

² https://www.energytrust.org/wp-content/uploads/2018/12/2018_DEI_Data_Baseline_Analysis.pdf

³ Further refinement and validation of this work is underway in a series of data gathering and evaluative initiatives collectively called the Data Enhancement Project. The Data Enhancement Project includes, but is not limited to, Fast Feedback results, customer information collected by and provided to Energy Trust by community-based information, and the 2020 Customer Insight Study.

3. Increase participation in the Trade Ally Network by minority-owned and women-owned business by 50% each by the end of 2020.
4. Increase the number of projects completed by minority-owned and women-owned trade allies by 15% by the end of 2020.
5. Increase the number of contracts executed with minority-owned and women-owned businesses by 15% by the end of 2020.
6. Increase market awareness and understanding of underserved populations by developing and deepening of relationships with up to 50 community-based organizations by the end of 2020.
7. Increase the diversity in recruitment and hiring of employees by 25% by the end of 2020.
8. Develop systems and support needed to collect, track, analyze and report demographic information related to program participation, program delivery and trade ally network members by the end of 2018.
9. Increase organizational cultural responsiveness by the end of 2020.
10. Increase transparency and community engagement by publishing the diversity, equity and inclusion operations plan and progress towards its goals.

When the current plan was developed in 2017, we envisioned our internal DEI Committee would serve as a resource, providing opportunities for continuous learning and feedback and a place to hold staff accountable for moving forward toward the goals of the plan. Over time, a different accountability structure emerged through a group of Diversity, Equity and Inclusion Operations Plan “goal leads.” The goal leads are Energy Trust staff members who have or currently serve on the internal committee and are each assigned to one goal or sub-goal. Goal leads have been responsible for monitoring and reporting on progress to the Diversity, Equity and Inclusion Plan goals since 2018. As the plan period draws to a close, these goal leads convened to drive the process for identifying new goals and targets with input from Energy Trust’s senior leadership, its internal DEI Committee and the Diversity Advisory Council.

Moving Ahead with Continuous Learning—2021 Plan Development

The Diversity, Equity and Inclusion Operations Plan identified specific goals through 2020. Extending the plan for one additional year will allow enough time for Energy Trust, with the guidance and leadership of Energy Trust DEI Lead Tyrone Henry to undertake an informed process, engaging the internal DEI Committee and goal leads, the Diversity Advisory Council (DAC) and other stakeholders to develop a Diversity, Equity and Inclusion Operations Plan to take Energy Trust ahead, moving the needle even farther. Insight and lived experience from stakeholders, along with information from Energy Trust’s DEI Data Baseline Analysis and Fast Feedback, will provide important data for development of the plan. Moreover, in 2021, information and insights from Energy Trust’s 2020 Customer Insights Study will also be complete and available to inform the next plan.

For 2021, however, the current Diversity, Equity and Inclusion Operations Plan will be extended with similar goals and new targets. The following 2021 goals and targets were developed by a project team working together from March through September of 2020. Project team members were Debbie Menashe, Tyrone Henry, Art Sousa, Abby Spegman and each of the Diversity, Equity and Inclusion Operations Plan Goal Leads: Ryan Crews, Kate Wellington, Alex Novie, Matt Getchel, Cameron Starr, Brigid Gormley, Sue Fletcher, Amanda Sales, Kenji Spielman and

Julianne Thacher. Draft targets and goals were presented to DAC in July 2020 and input received there was incorporated into the draft plan approved by Executive Team in October 2020.

The project team recommended 2021 goals and targets based on what is achievable in a typical year. This plan was drafted as the trajectory of the COVID-19 pandemic and economic recovery remain uncertain, and both of these may affect Energy Trust's success in achieving these goals and numerical targets. However, the plan focuses on serving rural communities, communities of color and people with low incomes, all customer groups that have been hardest hit by COVID-19. Whether or not we are successful in achieving these goals, this plan will guide our activities and ensure these customers are well served during this difficult time.

2021 Goals and Targets

Goal 1: Increase customer participation in energy-efficiency programs.

The purpose of Energy Trust's focus on diversity, equity and inclusion, including all its goals and related activities, is to increase customer participation in energy-efficiency and renewable energy programs. The operations plan outlines a single goal for Energy Trust's efficiency programs; to accomplish this, Energy Trust has approached the work on a sector basis with sub-goals for residential programs, commercial programs and industrial and agricultural programs. For 2021, Energy Trust will continue this disaggregated goal structure for the efficiency programs. In the future, we should consider whether this goal structure makes sense considering customers experience with programs, reporting needs and transparency.

Goal 1a: Increase residential participation of people of color.

2021 Target:

- 34% participation, which would be 3,500 single-family, small multifamily or manufactured homes projects within census tracts with a large proportion of people of color (census tracts identified as racially diverse 5 in the DEI Data Baseline Analysis)

Goal 1b: Support participation of small and medium commercial business customers and commercial business customers in rural areas.⁴

2021 Target:

- Support participation levels in Existing Buildings for small and medium business customers and business customers in very rural areas (census tracts identified as rural 5 in the DEI Data Baseline Analysis), aiming to serve 1,082 small and medium businesses and 54 customers in very rural areas

Goal 1c: Increase participation of small and medium industrial and agricultural businesses in rural areas.

2021 Target:

⁴ Site must use less than 100,000 kWh annually (if eligible electric service at the site) and less than 3,500 therms annually (if eligible natural gas service at the site).

- A 10% increase over 2020 goal participation in Production Efficiency for small and medium business⁵ customers in census tracts outside metro areas (census tracts identified as rural 2, 3, 4 or 5 in the DEI Data Baseline Analysis), which would be a minimum of 55 new customers with a stretch target of 67 new customers

Goal 2: Increase the adoption of solar projects benefitting low-income customers, rural communities and communities of color.

2021 Target:

- Assuming 1,700 completed residential projects, approximately 646 (38%) Solar Within Reach projects or projects in census tracts that are rural and have low- to moderate-income customers and people of color (census tracts identified as composite 4 and 5 in the DEI Data Baseline Analysis)
- Assuming 1,700 completed residential projects, approximately 765 (45%) of projects in census tracts with a large proportion of people of color (census tracts identified as racially diverse 4 and 5 in the DEI Data Baseline Analysis)

Goal 3: Increase participation in the Trade Ally Network by minority-owned and women-owned businesses.

2021 Target:

- Three new women-owned trade allies and six new minority-owned trade allies, which would be a 50% increase

Goal 4: Increase the number of projects completed by minority-owned and women-owned-trade allies.

2021 Target:

- 1,800 total projects completed by minority-owned and women-owned contractors, which would be a 15% increase

Goal 5: Increase the number of contracts with Black-owned, minority-owned and women-owned businesses and improve contract tracking systems to support increased supplier diversity.

2021 Target:

- Enter into 25 new contracts with minority-owned or women-owned businesses and 10 new contracts with Black-owned businesses in Oregon, which would be a 20% increase
- Track number of contracts with community-based organizations to establish a baseline for comparison for future contracting goals
- Establish a system for tracking community-based organizations by March 1, 2021

Goal 6: Build relationships with community-based organizations.

2021 Target:

- Continue to deepen and develop relationships with 50 community-based organizations to better reach and serve more diverse customers

⁵ Site must use less than 1 average MW (8,760,000 kWh) annually (if eligible electric service at the site) and/or less than 150,000 therms annually (if eligible natural gas service at the site).

- Have at least twice-yearly conversations with community-based organization focused on workforce diversity to understand workforce opportunities for energy efficiency and renewable energy
- Ensure more than half of the community-based organizations' missions are to serve people of color

Goal 7: Increase representation of staff identifying as people of color.

2021 Target:

- Increase percentage of applicants identifying as people of color by 10%
- Ensure at least 50% of all new hires identify as people of color

Goal 8: Determine new ways to track participation among communities of color, low-income households and rural customers.

2021 Target:

- Complete report on Data Enhancement Project
- Conduct contractor/trade ally analysis
- Explore market research to inform customer engagement (e.g., market and outreach) and differential baselines for developing new offers (e.g., measure development)

Goal 9: Increase the ability of staff and board to work across cultures and be more inclusive through structural organizational change and continuous staff learning.

2021 Target:

- Create a work environment that supports staff who are people of color
- Ensure 100% of Energy Trust employees attend a training that addresses gaps in organizational readiness

Goal 10: Increase awareness and understanding of the Diversity, Equity and Inclusion goals and progress.

2021 Target:

- Provide progress report in an appendix to Energy Trust's 2021 Q2 and 2021 Annual Report to the OPUC
- Ensure efforts to support diversity, equity and inclusion are reflected in organizational communications and public relations

These 2021 goals and targets were included in consideration for Energy Trust's proposed 2021 Budget and Action Plans and approved by Energy Trust's Executive Team. With that approval, implementation, monitoring and reporting will proceed for 2021.