

Energy Trust of Oregon

Diversity, Equity, and Inclusion Plan

Updated January 2024

Introduction

Since 2002, Energy Trust of Oregon (Energy Trust) has helped utility customers use less energy and generate renewable energy, saving millions on energy bills and creating income for local contractors while promoting a cleaner environment. **Our vision that guides this work is clean and affordable energy for everyone; however, historically, Energy Trust and the energy industry have overlooked groups such as BIPOC (Black, Indigenous and people of color) customers, people experiencing low to moderate incomes, customers that live in rural areas and diverse businesses and contractors.**

To fulfill our core purpose of delivering cost-effective energy efficiency and small-scale renewable energy to all our customers, Energy Trust must do a better job engaging those we have historically underserved. These engagements will allow us to better understand and address customer needs, ensuring they have meaningful opportunities to benefit from clean energy solutions. We understand these needs may not be directly related to energy and may include the need for affordable housing, economic opportunity, relief from the impacts of climate change and environmental injustice and addressing ongoing issues of systemic racism among others. It is incumbent upon us to work with these diverse communities to identify clean, just and responsible energy solutions that can contribute to addressing this suite of issues.

Energy Trust's previous diversity, equity and inclusion (DEI) work, including that embodied in our first DEI Operations Plan in 2018, focused on designing service offerings that would increase participation among these customer groups and trade ally businesses. While this remains a focus of this body of work, our previous efforts have exposed the need for more collaboration with the communities we serve. The solutions to increase participation must be informed by community members and everyone involved. **We must work together to identify needs, develop and test solutions, reflect on results and impact, and hold ourselves and each other accountable to what we say and do.**

This DEI Plan was initially developed over several months in 2021 and early 2022 with input from staff, Energy Trust's advisory councils and board members, stakeholders, utility staff, customers, contractors, community-based liaisons (CBLs) and community-based partners. It provides a framework for building trust and relationships with community members and community-based organizations so that we can work together toward mutually beneficial goals and outcomes.

This plan includes the following sections:

- Lessons from previous DEI work
- Feedback that informed this plan
- Central focus on community engagement
- Community engagement goals, outcomes and metrics
- Commitment to transparency and accountability

This work will require transparency, continuous reflection, decision and power sharing, a willingness to adjust, and an equity lens at every touchpoint. For that reason, this plan is a living document that will be revisited and updated to reflect lessons learned and changing needs. The strategies used, the outcomes we are working to achieve, and the metrics tracking success will evolve as we grow and learn from our engagements and commitments.

Lessons from previous DEI work

The primary objective of [Energy Trust's 2018-2020 DEI plan](#) was to meaningfully serve customer groups we had largely failed to reach in the past. It included 10 data-driven goals designed to challenge our organization and increase participation of communities and market segments historically underserved by Energy Trust programs by the end of 2020. (A subsequent [extension of the plan with revised goals for 2021](#) maintained this structure.)

These goals inspired new offers, such as enhanced incentives for communities and businesses historically underserved by Energy Trust, new relationship development with community organizations, and new ways of doing business that involved more engagement with stakeholders. These goals also revealed gaps in our process. For instance, higher cash incentives can drive participation for some customers across all races and ethnicities who have the means to pay the difference, but do not address all barriers for all customers and the markets that serve them. Transactional engagement with customers, contractors and additional stakeholders offers limited opportunities to collaborate and meet customer needs. These are some of the insights we gained from feedback by directly engaging with community-based organizations who have more expertise in serving the customers we endeavor to reach.

Some of the biggest lessons came from unintended consequences of our original goal structure, which was weighted toward quantitative goals over qualitative measures of success. Our communities' stories matter. Measuring customer participation alone did not accurately capture the effects of our work. We also found that census tract data is not an effective way of identifying participation by groups underserved by Energy Trust. Trade ally goals that focused on project numbers also prioritized quantity over quality, hence missing the opportunity to develop lasting relationships with contractors who would benefit from their affiliation with Energy Trust.

Reflection from staff revealed many areas for Energy Trust to act on, including the need to:

- **Support community-based organizations.** Our on-the-ground partners have been critical to our success thus far in reaching customers we have previously underserved. Some of these groups have limited resources to engage with Energy Trust. They need our support to continue to engage this critical role, and their engagement with Energy Trust should benefit their organization and clients.
- **Offer culturally responsive communication and outreach.** Energy Trust must create experiences for customer groups that address specific motivations and barriers. For example, we can hire staff and contractors that speak the language and better represent the people that we want to serve and create opportunities for customers to learn about and receive our services in a culturally responsive way.
- **Address needs in rural communities.** More work is needed to increase participation and benefits

for customers in rural areas. One critical need is workforce development to increase the number of skilled contractors available to serve rural areas. We must be sensitive to the impact of this work and ensure that it does not create unintended negative impacts to rural communities, customers and contractors.

- **Use data effectively.** Energy Trust should be collaborative, transparent and open to feedback on how its goals and targets are developed. Data should represent real-time feedback from community organizations and customers who receive Energy Trust services or have been excluded by Energy Trust in the past, ideally including demographic data. Reports on Energy Trust's DEI activities and lessons should be readily accessible to staff, contractors, community members and stakeholders.

Finally, an overarching imperative that emerged from our DEI efforts and evaluations of our impacts is the need for deep, authentic dialog, collaboration, and action between Energy Trust and the customers we have not served. The administration of Energy Trust's programs and the development of new program offers should evolve based on collaboration, input, and accountability. **We need customer and community perspectives to develop new offers that center race and consider the uniqueness of the rural experience and of being income constrained.**

We have learned that this work is challenging, pushes some of us out of our comfort zones and takes a lot of time because our organization is not as culturally responsive, inclusive and welcoming as it could be. We must recognize our role in implementing restorative justice and building trust in the communities we have overlooked in the past, embracing multiple perspectives and refocusing our mindset to one of community growth and collaboration. We must work to understand how our practices, policies and procedures reflect colonial mentalities and learn what the process of decolonization entails through a guided process with the communities we serve. We must find ways to adapt and innovate offerings that fit the needs of the customers we have not served in the past—with their collaboration and partnership.

Feedback that informed this plan¹

Energy Trust engaged stakeholders, customers, communities, community-based organizations, the board's ad hoc DEI Committee, utility staff, Oregon Public Utility Commission (OPUC) staff and Energy Trust staff and contractors to draft this plan from October 2021 to January 2022. This included meetings with the Diversity Advisory Council (DAC), Conservation Advisory Council (CAC), Renewable Energy Advisory Council (RAC), a network of community-based liaisons working on the Existing Building program, the Hispanic Metropolitan Chamber and the Oregon Native American Chamber. Project team members facilitated discussions and asked questions to understand how the plan could be most impactful and structured to allow flexibility and accountability. Staff also reviewed comments that were submitted to Energy Trust as part of its 2022 budget process related to diversity, equity and inclusion.

Finally, staff incorporated information gathered through a series of community summits in 2021 with residential customers, business customers, trade allies and Native Tribal Communities. These engagements were held to augment feedback on past DEI plans and capture new ideas to shape the goals and outcomes in the plan.

Input from these engagements indicated that the plan should center on equitable community engagement, a gap that was identified during the implementation of the previous plan, and that Energy Trust should coordinate with additional partners, including the OPUC and utilities, as they engage communities. Feedback also validated the concept of the plan as a living document able to be updated based on input from the community. The engagements called on Energy Trust to make further progress by establishing goals related to:

- Workforce development
- Relationship development
- Representation and participation of communities of color, customers experiencing low-income and customers living in rural areas in leadership and design of offers
- Earmarked dollars to those specific groups we seek to serve
- Community needs driving activities
- Accountability for the goals established in the plan
- Measuring success through the experience of those we engage

In addition to the 2021 Community Summits and the engagements to develop this plan, we also gathered feedback in 2021 through focus groups, market research and budget planning. Our staff conducted 10 interviews between April and October of 2021 with organizations representing rural, environmental justice, low-income, business and consumer interests that emphasized Energy Trust

¹Notes from specific engagement activities and summaries can be found in Appendices A and B.

should remove barriers to participation, build capacity in BIPOC-owned businesses and community organizations, and dedicate dollars to those we are seeking to serve and focus on rural communities.

Much of this feedback aligned with what we heard from attendees at community summits and from our staff. That feedback included that Energy Trust should build relationships and support trusted organizations that engage the community; direct resources where there are disproportionate energy burdens and in environmental justice communities; invest in and create wealth in communities of color, especially in Black and Indigenous communities; and remove barriers, address racial inequities and lack of representation within our organization.

Central focus on community engagement

Based on this feedback, this plan centers community engagement and power sharing as a strategy to better provide meaningful opportunities to customers who have historically been excluded from clean energy solutions. This strategy necessitates that Energy Trust develop cultural humility and form deeper relationships with communities across the state and with a variety of customer and contractor groups that have been underrepresented and underserved in our programs previously. The purpose of this is twofold:

- Developing more impactful, comprehensive solutions for customers requires a better understanding of their needs; and
- Early engagement allows for co-creation of programs or offers that are better positioned to meet those needs.

The collaborative nature of community engagement recognizes that transformation is possible by aligning common purposes and combining the unique skills, resources and expertise of all parties involved. For Energy Trust, this means offering our technical expertise and programmatic resources to communities, power sharing, and co-creating offers that serve the specific needs of those groups.

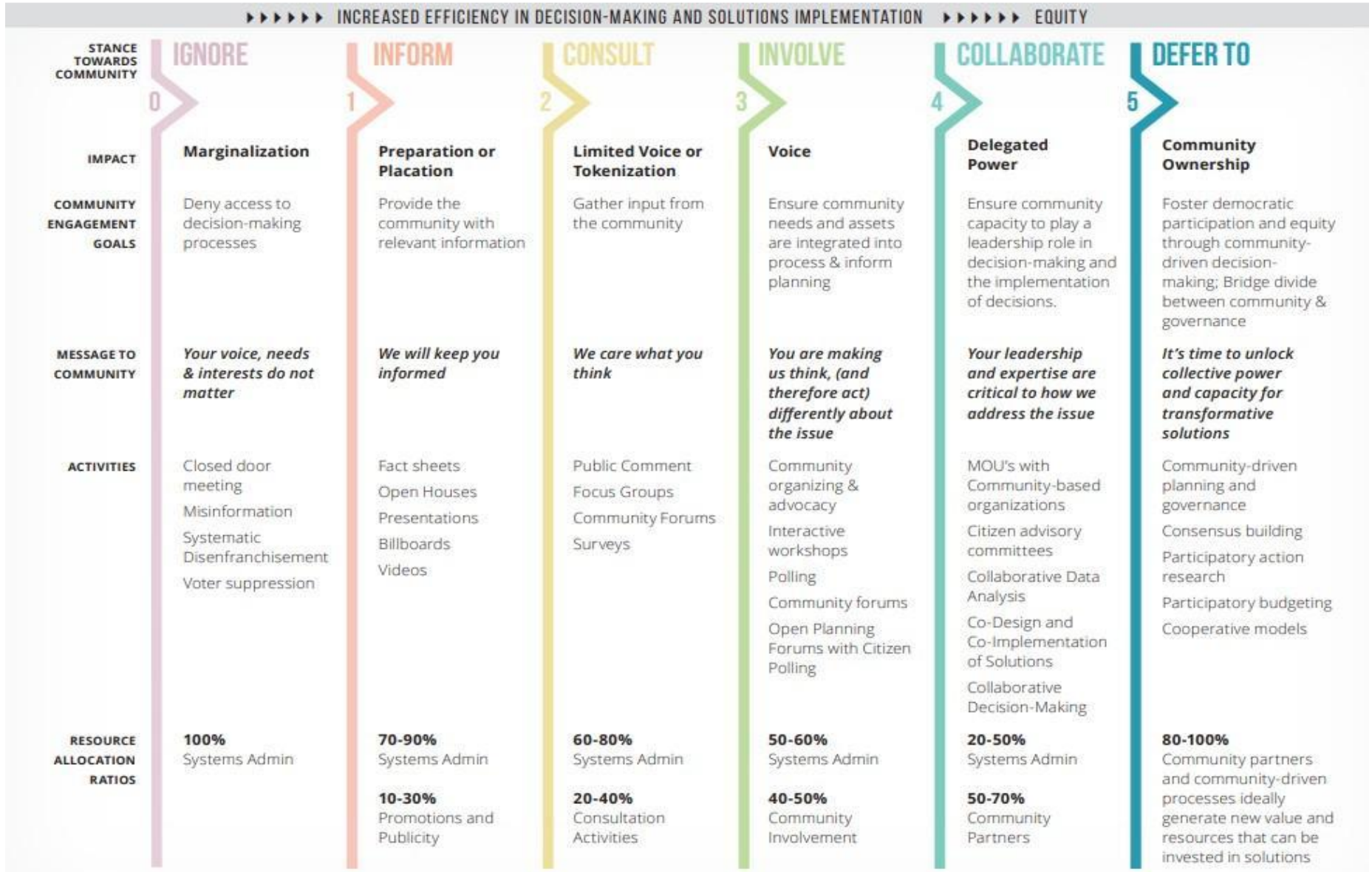
We rely on “The Spectrum of Community Engagement to Ownership” developed by Rosa González of Facilitating Power² to guide our community engagement efforts. The stages represent increasing levels of participation with a community, that span from zero participation to full community ownership. We use the spectrum to identify where we are with an engagement and to set goals for what stage of engagement we want to achieve.

²https://d3n8a8pro7vhmx.cloudfront.net/facilitatingpower/pages/53/attachments/original/1596746165/CE2O_SPECTRUM_2020.pdf?1596746165

Figure 1: Spectrum of Community Engagement, Facilitating Power



THE SPECTRUM OF COMMUNITY ENGAGEMENT TO OWNERSHIP



Historically, Energy Trust’s engagement has involved informing communities of programs or opportunities or consulting to gather input (levels 1 and 2 on the continuum). Going forward, we understand that each engagement will be different, and Energy Trust will co-determine, along with each partner, the level of desired engagement based on the mutual objectives within the partnership. In some cases, that may mean we need to work together to move to deeper levels of the engagement spectrum—to involve, collaborate and even defer to community voices to foster participation and equity. The depth of any given relationship will always depend on our mutual objectives and what works best for our partner.

Our community engagement work is guided by these principles, adapted from the *North American Association for Environmental Education Community Engagement: Guidelines for Excellence*:

Guiding principle	What this looks like
<p>Community-Centered Engagement needs to be anchored within community interests and leadership. Elevating community expertise, issues and capacities is a top priority.</p>	<ul style="list-style-type: none"> ● Get to know and understand the community, including its norms, history and experience with engagement efforts ● Connect Energy Trust interests and capacities with community concerns, assets and aspirations ● Consider the levels of appropriateness for community engagement ● Focus on community culture, assets and shared priorities ● Reach beyond usual partners and program delivery modes
<p>Based on Sound Program Design Principles Energy Trust’s offers presented to communities rely on established principles and proven practices of the field and are applicable to the community.</p>	<ul style="list-style-type: none"> ● Facilitate broad accessibility through the lens of targeted universalism ● Select, adapt or develop effective educational materials ● Match engagement strategies and tools to the interests, issues and capacities of our partnership with community ● Build on interests, issues and settings familiar to the community
<p>Collaborative and Inclusive Community engagement efforts must be formed through collaborative and inclusive relationships, partnerships and coalitions.</p>	<ul style="list-style-type: none"> ● Be clear about the goals of the effort ● Value and incorporate diversity, equity and inclusion ● Plan and implement collaboratively ● Learn from and resolve conflict ● Build coalitions and partnerships strategically
<p>Focus on Capacity Building Energy Trust supports capacity building in communities, contributing to long-term community engagement.</p>	<ul style="list-style-type: none"> ● Leverage and strengthen local assets; invest in building capacity for engagement ● Support and build community capacity ● Be prepared to release control to the community and be flexible enough to meet its changing needs
<p>Long-Term Investment in Change Working in communities to create change is typically a long-term initiative, requiring a commitment to relationship building and an ongoing and evolving process of engagement.</p>	<ul style="list-style-type: none"> ● Assess individual and organizational readiness for community engagement ● Incorporate learning, improvement and adaptation ● Plan for long-term support and viability ● Embrace change and celebrate progress

Engagement typically includes a variety of steps that might be undertaken as part of a cycle (see *Figure 2*): discovery, ideation, feedback, action and reflection.

- **Discovery** is usually the first step in the engagement cycle. It typically involves the various participants developing an understanding of one another with a focus on goals, priorities, needs, resource availability and/or culture. This is usually the beginning of a relationship where mutual objectives and alignment are recognized.
- **Ideation** is the process of proposing, considering, exploring and designing possible solutions to achieve the identified mutual objectives. It often involves more than one meeting or discussion and can result in one or multiple ideas to explore. Roles, responsibilities and resources can also be explored during this step, so all entities understand one another's expectations and depth of engagement.
- **Feedback** involves engaging potential customers and stakeholders to get input on the solutions identified during ideation. This step helps reduce uncertainty and mitigates risk by getting early feedback on the solutions. Changes can be made relatively easily and quickly with little or no cost to improve the likelihood that the solution will be successful.
- **Action** typically includes the implementation of a solution. Each party's role in this step needs to be clearly defined and agreed upon. Who is funding the solution? Who is representing it to customers? Who is providing staffing or volunteer resources?
- **Reflection** is an opportunity for everyone to consider the effectiveness of the solution and propose potential improvements. This step includes accountability and an assessment of the success measures established for the solution. Were the outcomes achieved? Were promises kept? It is characterized by candid discussions about what did and did not work. This step is also a good time to reflect on the value of the engagement itself and assess how to further develop or dissolve the relationship.

Figure 2: The Cycle of Engagement



Each revolution of the cycle may produce a variety of results including relationship development that includes healing and establishing trust, capacity building, program developments, etc. The process may also reveal new discoveries and engagements that spin off into different cycles of engagement.

The participants in each step of this cycle and the degree of involvement varies depending on the level of engagement according to the spectrum. A relationship that is at level 2 (consult) or level 3 (involve) may include all participants at the discovery, feedback and reflection steps, but might only include Energy Trust staff at the ideation or action steps. The level of the relationship on the spectrum will determine who is included in each step and how deeply involved they are in the entire cycle.

Community engagement goals, outcomes and annual metrics

Energy Trust is dedicated to helping utility customers in Oregon and Southwest Washington save energy and generate renewable power. The overall purpose of Energy Trust's DEI efforts is to ensure that customers who have historically been underserved by Energy Trust's programs or not directly benefitted from clean energy solutions (including but not limited to people of color, customers experiencing low incomes and customers living in rural areas) have meaningful and equitable access to the solutions we support. This plan identifies five high-level strategic goals in support of this purpose.

These goals strive to share power and institutionalize diversity, equity and inclusion throughout the organization, including for staff, advisory councils, program implementation contractor teams and supplier and trade ally networks.

The goals, outcomes and metrics will continue to be refined through a process of iterative community engagement. Within each goal, we have identified various outcomes, or what the future might look like when we are successful, as well as specific metrics and measurements that help assess our progress, and how we will hold ourselves accountable.

The five high-level strategic goals we are establishing in this plan are to:

1. Increase representation and readiness
2. Shift and share leadership and power
3. Increase community capacity and investment in BIPOC, people experiencing low income, and people living in rural communities
4. Increase transparency and accountability
5. Deepen engagement in BIPOC, people experiencing low income, and people living in rural communities

Each **Goal** contains **Outcomes** that represent the future or ideal state if Energy Trust is successful in advancing DEI efforts. These are long-term and multi-year outcomes.

Each **Goal** contains a **Metric and Measurement** that we are using to track qualitative and quantitative data. Energy Trust believes these metrics and measurements will help us track our progress in achieving our goals and outcomes. We anticipate the metrics will evolve over the years as we engage communities and determine what is important to stakeholders and what is feasible to track. The metrics are intended to start intentional and meaningful conversations. In some situations, we anticipate engagements will result in establishing targets related to specific metrics.

Goal 1: Increase Representation and Readiness

- **Outcome 1.1:** Diverse perspectives and ideas contribute to the creation of equitable solutions to support all communities in realizing the benefits of clean energy solutions.
- **Outcome 1.2:** 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.
- **Outcome 1.3:** Energy Trust staff engage diverse communities in a respectful, effective and culturally relevant and responsive manner.

Metric and Measurement: Number of cultural awareness training and events (e.g., Diversity Days, DEI training, cultural events, etc.) attended by staff.

Goal 2: Shift and Share Leadership and Power

- **Outcome 2.1:** Community members have influence in the design and implementation of Energy Trust programs to serve communities historically underserved by Energy Trust.
- **Outcome 2.2:** Communities and community-based organizations have significant ownership and agency in identifying and delivering responsible clean energy solutions co-created with Energy Trust.

Metric and Measurement: Number of community members who participate in Energy Trust projects, initiatives or advisory groups to provide input and influence program design.

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

- **Outcome 3.1:** Energy Trust contracts with a broad diversity of businesses to support our work and represent a variety of perspectives and approaches.
- **Outcome 3.2:** Our Trade Ally Network reflects a broad diversity of businesses to better serve all Energy Trust customers.
- **Outcome 3.3:** 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.
- **Outcome 3.4:** 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 and Measurement: Percentage of expenditures to subcontractors on contracts over \$100,000 paid to businesses certified by the Certification Office for Business Inclusion and

Diversity (COBID) as a Minority Business Enterprise, Women Business Enterprise, Service-Disabled Veteran Business Enterprise or Emerging Small Business.

Goal 4: Increase Transparency and Accountability

- **Outcome 4.1:** Communities and organizations understand how their input and involvement impacts our work.
- **Outcome 4.2:** Energy Trust is a learning organization where accountability is based on learning from both successes and failures utilizing a responsibility process in which solutions to identified problems are acted on to improve future outcomes.

Metric and Measurement: Energy Trust exceeds its annual Oregon Public Utility Commission performance measure on equity metrics.

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

- **Outcome 5.1:** 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.
- **Outcome 5.2:** 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 and Measurement: Number of community engagement activities planned for the current program year and results from those completed engagements.

Commitment to transparency and accountability

Through early engagements with stakeholders and communities, we've heard transparency and accountability are central to the success of this plan. Transparency will be demonstrated through Energy Trust's commitment to collecting input and feedback on our work and sharing progress – or lack thereof – towards the goals and objectives described above. Accountability for accomplishing these goals and for learning from our efforts takes many forms as described below.

Transparency

To address the objective of transparency, Energy Trust envisions this plan to be a living document that will regularly be updated to reflect the engagements undertaken and the outcomes of those engagements. We will provide regular updates on the goals and annual metrics reflected in this plan to the DAC, our board and the OPUC. These will include quantitative measures of our efforts and, more meaningfully, customer-focused stories that reflect the impact of our work in the communities we are seeking to engage and better serve. In addition, Energy Trust will continue to provide updates on its DEI work in its quarter two and annual reports to the OPUC, which are required under Energy Trust's grant agreement with the OPUC and available publicly. Energy Trust will initiate discussions to assess the validity of our results and provide suggestions on possible improvements such as engaging the services of a third-party evaluator or including these metrics in planned program process and impact evaluations.

Energy Trust will invite continuous public feedback on our work toward achieving the DEI metrics set in this plan. In addition, staff may expand community outreach through programs, events and partnerships to hear additional perspectives and context on the priorities and needs of our customers and communities. Written comments and informal feedback will be shared with staff and will be made public. Staff will continually seek feedback from members of our public advisory councils. Feedback on progress and tactics will be reflected in future iterations of this plan or may influence how staff implements programs and offers in the future.

Public and community feedback provides an opportunity for staff to better understand the priorities of organizations and individuals, so we can refine our plan to support those priorities. Methods for gathering feedback may include the ability to [submit a comment form from our website](#), surveys of current and new community partners and open forums at events and trainings. This valuable feedback will help shape this plan as it evolves as well as future DEI work.

Accountability

As a nonprofit grantee of the OPUC, Energy Trust is accountable to a variety of entities. Staff are responsible to our board who answers to the communities we serve. The OPUC oversees our work as the administrator of the ratepayer funds we receive, and we are ultimately accountable to those who

contribute to our funding. This plan is a requirement of Energy Trust's DEI policy and staff are required to report on the progress of the metrics reflected in this plan to the board. These requirements are further reflected in the annual work plans of the executive director and all staff at Energy Trust. Annual performance reviews including any determination of merit pay is based, in part, on staff's ability to achieve these metrics.

As part of our grant agreement, the OPUC annually establishes performance measures to assess Energy Trust's administration of ratepayer funding. Since 2018, these performance measures have included a set of DEI-related measures that hold Energy Trust accountable to the work identified in this plan. Failure to achieve OPUC performance measures risks a "notice of concern" from the OPUC, which can jeopardize our grant agreement.

Ultimately, Energy Trust is accountable to the communities and customers it serves. To enable those communities to exercise that accountability, Energy Trust will organize annual engagements with communities and stakeholders to review our progress and assess the effectiveness of this work.