

# Energy Trust of Oregon

## Diversity, Equity and Inclusion Operations Plan

Updated December 14, 2018

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 those we serve.

Energy Trust needs to effectively engage Oregon's diverse residents and businesses to fulfill our core purpose of delivering cost-effective energy efficiency and small-scale renewable energy to the customers of Portland General Electric, Pacific Power, Northwest Natural, Cascade Natural Gas and Avista who fund our work. By becoming a more diverse, equitable and inclusive organization, and by engaging contractors, trade allies and other partners with diverse perspectives, skills, customers and constituents, we will be better equipped to expand our customer base and deliver more affordable, clean energy.

## **Achieving Our Purpose**

We understand that investments in energy efficiency and renewable energy lower energy costs, cut carbon emissions and strengthen local communities—resulting in economic benefits for all. However, there is more we can do to reach communities in our service territory who may be underserved by our programs.

We developed a Diversity, Equity and Inclusion Operations Plan to better understand if and where gaps exist, and to achieve energy efficiency and renewable energy program participation outcomes across a broad range of customer characteristics, including communities of color, rural communities, and people with low and moderate incomes in all areas of our programs and operations.

The Diversity, Equity and Inclusion Operations Plan is an important step in our continuous journey to learn and innovate, to implement new approaches that expand participation, and to evaluate our programs to achieve our core purpose: to deliver benefits to the utility customers we serve through energy efficiency and renewable energy.

## **About the Diversity, Equity and Inclusion Operations Plan**

To develop this Diversity, Equity and Inclusion Operations Plan, Energy Trust staff members engaged in a six-month planning process in which members of Energy Trust's diversity, equity and inclusion committee (a cross-functional team of staff) and Management Team discussed concepts and vetted information with internal work groups to inform the plan's 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.

In addition to the 10 goals outlined in the operations plan, Energy Trust developed additional resources to support diversity, equity and inclusion, including:

- A diversity, equity and inclusion policy approved annually by the board of directors
- A charter to guide an internal diversity, equity and inclusion staff committee
- A committee of staff working to form a Diversity Advisory Committee to advise the board of directors
- A glossary of terms
- A diversity, equity and inclusion lens, which is a tool to ensure staff consider diversity, equity and inclusion in decision making
- A diversity, equity and inclusion data, baseline and participation analysis report

This plan was developed with the understanding that feedback will strengthen the plan and resulting outcomes, and will be incorporated through a continuous improvement process. Going forward, Energy Trust's diversity, equity and inclusion committee will monitor implementation of the plan and incorporate new information or adjustments as we learn.

## **About the 2018-2020 Diversity, Equity and Inclusion Goals**

We have identified 10 goals over the next two years that will set the course of our activities. We designed these goals with the specific and foremost intent of increasing participation in our energy efficiency and renewable energy programs by underserved populations. Collectively, the goals will work to further our core mission of delivering energy efficiency and clean renewable

generation to our customers. Energy Trust is committed to ensuring that its programs and activities are equitably accessible to all of its customers.

The goals are intended to indicate that this work is a priority. We have and will continue to invest time and resources to ensure our success meeting these goals because we believe the success of our mission is underpinned by the success of our diversity, equity and inclusion work. This work is not mandated by state or federal regulations. It stems from our commitment to the utility customers we endeavor to serve, and our recognition of the importance of expanding participation in achieving our purpose.

### **Energy Trust of Oregon Diversity, Equity and Inclusion Operations Plan Goals**

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 we intend to meet by 2020.

1. Increase customer participation in energy efficiency programs for all underserved populations by 20 percent 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 percent by the end of 2020.
3. Increase participation in the Trade Ally Network by minority-owned and women-owned business by 50 percent each by the end of 2020.
4. Increase the number of projects completed by minority-owned and women-owned trade allies by 15 percent by the end of 2020.
5. Increase the number of contracts executed with minority-owned and women-owned businesses by 15 percent by the end of 2020.
6. Increase market awareness and understanding of underserved populations by developing and deepening of relationships with up to 50 organizations (e.g. community-based organizations, culturally specific/culturally responsive organizations, municipal agencies, membership organizations, etc.) by the end of 2020.
7. Increase the diversity in recruitment and hiring of employees by 25 percent 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.

## Why These Goals?

We identified these goals specifically because of their relational nature. Goals 3 through 10 work to build the capacity to design, develop and deliver Energy Trust's programs in ways that are engaging of a greater diversity of customers in support of Goals 1 and 2.



**Goals 1 and 2:** The underlying purpose of all of Energy Trust's diversity, equity and inclusion goals and related activities is to increase customer participation in Energy Trust's energy efficiency programs (Goal 1) and renewable energy programs (Goal 2).

**Goals 6 and 8:** Building relationships with community-based organizations and expanding our ability to collect, track and analyze data are foundational to Energy Trust's diversity, equity and inclusion goals and activities.

Relationships with community-based organizations are the most efficient and effective way to understand and reach underserved communities. These partnerships leverage the expertise and knowledge of other organizations and build trust and participation in Energy Trust's activities.

Data analysis, leveraging best available data, will help identify which customer segments are underserved, and, therefore, where Energy Trust should focus.

**Goal 3:** Increasing the diversity of Energy Trust’s Trade Ally Network ensures that businesses working with underserved customers are delivering program incentives and benefits to them.

**Goal 4:** Increasing the number of projects completed by diverse trade allies ensures that Energy Trust is tracking the benefits of participation in its programs and minimizing any obstacles to participation.

**Goal 5:** Diversifying the organizations and suppliers with whom Energy Trust contracts demonstrates a commitment to our diversity goals, and it ensures that the underserved customers we seek to serve will be engaged in our delivery strategies.

**Goal 7:** Staff diversity “not only helps an organization get rid of its blind spots and relate to the communities it serves, but also increases creativity and makes good business sense.” (Beasley, Maya A. PhD, *Beyond Diversity*, May 2017, [www.diversegreen.org](http://www.diversegreen.org), p. 3.)

**Goal 9:** Cultural responsiveness is critical to ensuring that change is embraced and fully realized by an organization. It is foundational to an effective diversity strategy.

**Goal 10:** Transparency is a core value of Energy Trust. It is the framework we will use to communicate about all our diversity, equity and inclusion activities.

Informed by our diversity, equity and inclusion data, baseline and participation analysis, we established baselines and benchmarks for each goal to ensure they are meaningful, challenging and achievable. Quantifiable targets will help Energy Trust achieve goals and demonstrate our commitment to these efforts.

### **Principles Guiding Our Approach to Diversity, Equity and Inclusion Goals**

Our approach to accomplishing these diversity, equity and inclusion goals is guided by these important principles:

#### **Reinforce our core purpose:**

The business case for our diversity, equity and inclusion initiative and goals is to expand participation to fulfill our core purpose of delivering benefits to utility customers through energy efficiency and renewable energy programs. We see our diversity, equity and inclusion work as critical to accomplishing our energy goals and benefitting the utility customers who fund our services.

#### **Maintain our customer focus:**

We seek to enhance our ability to effectively design programs and deliver services to all eligible customers. Energy Trust will focus on understanding levels of participation of communities of color, people with low and moderate incomes, and rural communities. We will develop a deeper understanding of how to ensure we are effectively engaging the populations within these diversity categories. If we observe gaps, we will focus efforts on closing those gaps to expand participation and pursue additional savings and generation to fulfill our purpose.

#### **Further our learning culture:**

Energy Trust will approach diversity, equity and inclusion work with humility and openness to learning. We are not experts, but we will create opportunities for our board of directors, employees, contractors and trade allies to learn about diversity and inclusion and share their experiences and ideas to better equip the organization to accomplish its core purpose.

**Aspire to meet and exceed goals:**

Energy Trust is committed to achieving diversity, equity and inclusion goals so we can effectively expand participation, thereby meeting and exceeding our energy goals. As a goal-driven organization, we will work toward building internal infrastructure and support for achieving our goals, and we will continue to work with external partners to refine approaches toward that end.

**Establish and deepen relationships with community-based organizations:**

Energy Trust will work collaboratively with communities, and we recognize the important contributions of community-based organizations to helping us accomplish our goals. We understand the importance of relationships to our learning, our understanding of data, our understanding of barriers encountered or perceived by customers, and our ability to develop more effective program approaches.

**Ground decisions in data and information:**

Energy Trust seeks to ground decisions in data and the best available information. We are committed to refining and improving our diversity, equity and inclusion data analysis, data collection and reporting abilities. We also understand and value multiple ways of knowing, and we acknowledge that there are many ways to understand and engage customers, including through the lived experiences of communities. Our decisions and actions will be based on many sources of information to provide greater understanding.

**Integrate talent and expertise across the organization:**

Energy Trust will approach diversity, equity and inclusion in a cross-functional manner and apply the tools and techniques learned in other applications. We operate in a complex environment, which requires that we work in a highly interconnected and aligned manner. As we attract and retain a more culturally aware, diverse and inclusive workforce and contractor pool, we will gain innovation, creativity and solutions that will help us better serve all customers.

**Be transparent:**

Energy Trust continues our commitment to transparency in our diversity, equity and inclusion efforts. We will measure and report progress to our board of directors and the public, welcoming continued collaboration and feedback to inform our learning.

**What Does Success Look Like?**

When diversity, equity and inclusion are part of who we are and how we work to reach, serve and deliver benefits to utility customers, Energy Trust will be more innovative and better positioned to meet future goals. If we are successful, we will:

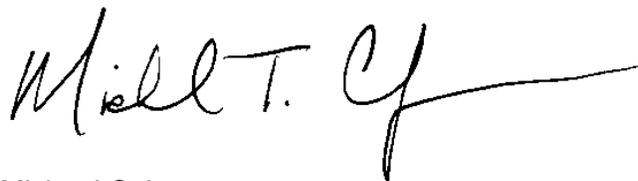
- Be better equipped to serve all eligible customers

- Work with more and different contractors and expand procurement opportunities for service and products suppliers who can help us reach diverse customers
- Accomplish more energy savings and renewable generation results than we would otherwise achieve without such efforts
- Recruit, hire and support a more diverse workforce that is better equipped to bring perspectives that help us better understand and serve diverse customers
- Gain competitive and strategic insights and perspectives
- Improve employee retention in a competitive economy

### **Next Steps**

To implement the plan and achieve goals, Energy Trust will continue to engage with new and established partners, contractors and stakeholders. We look forward to learning, innovating and leading together in the years to come.

More information about Energy Trust is available at [www.energytrust.org/diversity](http://www.energytrust.org/diversity).

A handwritten signature in black ink that reads "Michael T. Colgrove". The signature is written in a cursive style with a long horizontal line extending to the right.

Michael Colgrove

Executive Director  
Energy Trust of Oregon