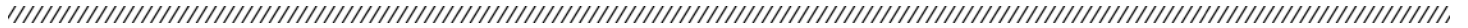


# 2020 Progress toward diversity, equity and inclusion goals



ENERGY TRUST OF OREGON  
APRIL 15, 2021

Energy Trust developed 10 diversity, equity and inclusion goals to improve and enhance offers for underserved customers. Goals were finalized at the end of 2018 using baseline data through 2017 unless otherwise noted. Progress reports were provided in Energy Trust's Q2 2019, 2019 annual and Q2 2020 reports to the OPUC. This appendix reflects activities and progress made from January 2019 through December 2020 unless otherwise noted. Energy Trust identifies underserved customers (people of color, people with low incomes and people in rural areas) based on census tract characteristics.

Highlights of this work and key lessons learned include:

- Since the launch of its first Diversity, Equity and Inclusion Operations Plan in 2018, the organization has formed a Diversity Advisory Council with members who represent communities of color and rural Oregonians.
- Energy Trust hired a diversity, equity and inclusion lead, a full-time senior management position, to work with that council, manage an internal staff committee and help Energy Trust incorporate diversity, equity and inclusion into all aspects of its work.
- Staff began hosting monthly events called Diversity First Thursdays to highlight the history and experiences of marginalized groups designed. The events are designed to broaden staff's awareness and promote conversations among staff and stakeholders.
- As the COVID-19 pandemic unfolded, Energy Trust prioritized development and delivery of low- and no-cost offers for people disproportionately impacted, including communities of color, customers with low incomes and those who lost jobs as a result of the pandemic.
- Also in 2020, staff worked closely with rural customers who were impacted by wildfires and floods, surfacing lessons on how to better support customers and trade allies in the face of adversity from natural disasters.
- The Solar program launched incentives and grant offers to help connect income-qualified customers with solar energy, whether through rooftop solar at single-family or multifamily homes or community solar projects developed by public agencies and nonprofits.
- In 2020, Energy Trust set new diversity, equity and inclusion goals for 2021 with new targets to increase customer participation, deepen relationships with community partners, work with minority-, women- and service-disabled veteran-owned trade allies and more.
- In 2021, Energy Trust will engage stakeholders to inform its next set of diversity, equity and inclusion goals and objectives. Staff will seek input from community-based organizations, customer advocates, community leaders, business and trade groups in the planning process to guide development of goals and strategies that meet the needs of underserved customers.
  - Staff will develop metrics and methods for data collection that support meaningful reporting on progress and will do additional research and analysis as needed to continue to learn from and adjust program strategies to meet diversity, equity and inclusion goals.
  - Energy Trust will implement a supplier diversity tracking system and track how much Program Management Contractors and Program Delivery Contractors spend with minority-, women- and service-disabled veteran-owned businesses as well as professional service contracts generated by Energy Trust staff.

## Key

Goal achieved	Goal not achieved
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**Goal 1: Increase customer participation in energy efficiency programs for all underserved populations by 20% by the end of 2020.**

**Goal 1A: Increase residential participation rate by 20% in communities of color by the end of 2020.<sup>1</sup>**

Baseline	Results	2020 Target	Status
50,185 total participants from communities of color through 2017 (24% participation rate)	5,350 new participants in 2020 for a total of 65,658 participants from communities of color (31.4% participation rate)	60,593 total participants from communities of color through 2020 (a 20% increase to participation rate)	

- As the pandemic unfolded, Energy Trust focused on serving those who were disproportionately impacted. Offers included promoting free Energy Saver Kits; coordinating with Pacific Power on no-cost smart thermostat and Energy Saver Kit distribution to rural customers and those who received energy assistance; distributing more than 50,000 free LEDs through food pantries, churches and other community-based groups that serve vulnerable clients; and expanding eligibility for higher Savings Within Reach incentives.
- The OPUC approved Energy Trust expanding co-funding efforts with agencies that serve low-income Oregonians after an initial effort with the community action agency in Washington County resulted in reaching more customers and achieving additional savings.
- In 2020, Energy Trust launched Community Partner Funding, a suite of higher incentives for nonprofits and community agencies that serve communities of color, rural customers, customers with low incomes, veterans and/or people experiencing disabilities. Six organizations enrolled in Community Partner Funding including Verde, Community Energy Project, Community Action in Washington County and Portland Community Reinvestment Initiatives, Inc. Energy Trust distributed more than \$350,000 in incentives with them in 2020.
  - Incentives helped fund home energy assessments and installation of heat pump water heaters, ductless heat pumps, smart thermostats and other energy-saving products.
  - Higher incentives significantly reduce customer costs for energy-efficiency upgrades. For example, with funding from Energy Trust and other sources, Verde reduced the average customer cost of a new ductless heat pump from \$4,000 to \$428.
  - Participating organizations collected demographic information from participants, indicating that these offers are reaching low-income customers, people of color and people with disabilities.

**Going forward:**

- COVID-19 is having a disproportionate effect on communities of color and customers with lower incomes; out-of-pocket costs, already a strain for many, are now a more significant barrier for these customers. Working with community-based organizations to provide low- and no-cost upgrades will be essential to increasing participation in these communities.
- Energy Trust will create and build on relationships with community-based organizations, especially those that support rural areas and Black customers.
- In some cases, the program design or offer that best meets the needs of an underserved customer did not result as new projects or participants that count toward this goal. Reaching communities of color should not be limited to select census tracts and should not require collecting customer-specific data.

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<sup>1</sup> A stretch goal of 66,128 participants was created in 2020 and achieved at 97%.

**Goal 1B: Increase participation in Existing Buildings program for small and medium business customers and business customers in very rural areas by 20% by the end of 2020.**

Baseline	Results	2020 Target	Status
1,200 participating small/medium businesses per year on average (7% cumulative participation rate for small/medium business)	1,989 participating small/medium businesses (8% cumulative participation rate for small/medium businesses)	3,000 additional participating small/medium businesses in 2019 and 2020 (9% cumulative participation rate for small/medium businesses)	
50 participating very rural businesses (7% cumulative participation rate for very rural businesses through 2017)	129 participating very rural businesses (10% cumulative participation rate for very rural businesses)	120 additional participating very rural businesses in 2019 and 2020 (7% cumulative participation rate for very rural businesses)	

- Energy Trust worked with community service, community-based and culturally specific organizations, rural chambers and economic support organizations to reach business customers and increase participation. Efforts included:
  - Hosting an event for small foodservice businesses to promote commercial foodservice equipment upgrades. Information was offered in English and Spanish.
  - Enlisting bilingual and multicultural outreach staff member to support Spanish and English-speaking Latino customers.
  - Partnering with LatinoBuilt to host events for Latino contractors to learn about Energy Trust.
  - Launching HVAC, water heating and foodservice offers to help small and medium business customers make upgrades beyond lighting.
- In 2020, Energy Trust restructured its Existing Building and Multifamily programs and business lighting offers. Starting in 2021, TRC will manage Existing Buildings, which will include multifamily offers. TRC proposed using new strategies to increase participation among minority- and woman-owned businesses and community-based organizations, including developing a network of community-based liaisons focused on communities of color, low-income and rural communities.
- COVID-19 significantly impacted small businesses, particularly for restaurants and foodservices that were ordered to close, which limited their ability to do projects in 2020 and made this goal difficult to reach.

**Going forward:**

- As businesses look to recover from the pandemic and wildfires in Oregon, Energy Trust will need to streamline its support. Outreach should be coordinated across Energy Trust programs to reduce confusion and increase participation.

- Energy Trust will consider ways to expand access to multilingual and multicultural support. Adding multilingual staff and working with non-English speaking partners helped improve outreach and complete projects, particularly with Spanish-speaking contractors and customers.
- Given that Russian is the third most spoken language in the state, Energy Trust should invest resources in reaching this community through Russian language media outlets.

**Goal 1C: Increase customer participation in Production Efficiency for small and medium businesses in rural territories by 20% by the end of 2020.**

Baseline	Results	2020 Target	Status
413 total small/medium sites served through 2017	752 total small/medium sites served through 2020	495 total small/medium sites served through 2020	

- To support industrial and agricultural customers affected by COVID-19, Energy Trust launched bonuses, increased incentives for Strategic Energy Management (SEM) and rolled out virtual project verifications. These changes helped customers achieve savings despite disruptions related to COVID-19.
  - Not all business sectors were equally affected by COVID-19 as originally expected. While paper, food processing/distribution/storage for grocery stores, wineries and cannabis businesses largely remained stable or grew in 2020, other sectors such as aerospace, food production and distribution for hospitality were strained and less likely to engage in energy-saving projects.
- A no-cost tubular LED installation offer for small commercial and industrial customers launched in 2019 in Eastern Oregon and in Southern Oregon in 2020. However, supporting lighting offers in rural areas is challenging when there are few local trade ally contractors and many were focused on renewable and residential activity.
- The standard industrial track had a field staff person focus attention in Southern Oregon, which resulted in an increase of five projects compared to 2019.

**Going forward:**

- Energy Trust will consider ways to coordinate metrics and activities for small, medium and rural businesses and business owners across its commercial and production efficiency programs to engage more customers and better serve communities.

**Goal 2: Increase customer participation in solar projects for low-income, rural and racially diverse communities by 20% by the end of 2020.**

Baseline	Results	2020 Target	Status
33% of 2017 residential solar projects sited in low-income, rural and racially diverse communities (597 out of 1,831 projects)	32% of 2020 residential solar projects sited in low-income, rural and racially diverse communities (522 out of 1,618 projects)	38% of 2020 residential solar projects sited in low-income, rural and racially diverse communities	

- Energy Trust created higher incentives for income-qualified customers. Solar Within Reach incentives, which are five times the standard residential solar incentive and cover about half of the cost of a solar system, exceeded the first-year targets for applications and installations, achieving 180 applications and 86 installations.
  - As part of its COVID-19 response, Energy Trust allocated additional funding for Solar Within Reach incentives.

- The offer was effective at making progress toward this goal but not enough to meet it given the requirement that projects be sited in low-income, rural and racially diverse communities. While all Solar Within Reach projects support the intent of the goal, not all counted toward its progress.
- Energy Trust awarded \$80,000 in grants to community-based organizations exploring innovative solar project models benefiting underserved customers, including residential and community solar projects.
- Energy Trust introduced and enrolled 14 projects in its Community Solar Development Assistance offer for community groups, nonprofits and municipalities interested in participating in the Oregon Community Solar Program. This helps community solar projects that will benefit underserved customers—including low- and moderate-income customers, communities of color, tribes, renters and rural customers—do early design and financial planning that increases the likelihood of success.
- In 2020, Energy Trust introduced a new solar incentive offer targeting affordable multifamily properties and nonresidential projects by nonprofits and tribes that will benefit underserved communities.

**Going forward:**

- Metrics should capture all renewable energy activities and benefits beyond energy generation, such as non-energy benefits for underserved populations and non-residential projects.
- Energy Trust can only offer incentives to cover the above-market cost of renewable energy installations. When demand exceeds the program’s budget, Energy Trust will consider ways to prioritize projects with additional benefits.

**Goal 3: Increase participation in the Trade Ally Network by minority- and women-owned businesses by 50% each by the end of 2020.**

Baseline	Results	2020 Target	Status
25 total minority-owned businesses enrolled as of 2017	12 new minority-owned businesses enrolled (total of 44)	13 new minority-owned businesses enrolled as of 2020 (total of 38)	
15 total women-owned businesses enrolled as of 2017	6 new women-owned businesses enrolled (total of 37)	8 new women-owned businesses enrolled as of 2020 (total of 23)	

- Energy Trust increased memberships and activities with trade organizations to spread awareness of its Trade Ally Network and offers, including with the Oregon chapter of the National Association of Minority Contractors (NAMC), Oregon Tradeswomen, LatinoBuilt and Professional Business Development Group (PBDG).
  - Energy Trust held two outreach events with LatinoBuilt in 2020 focused on the benefits of joining the Trade Ally Network and highlighting bonus incentive offers for commercial customers.
  - Energy Trust co-hosted an inaugural community resource fair with NAMC in 2020 to increase awareness in Black and Latino communities. (A similar event was held online in January 2021 with NAMC and Portland Housing Bureau.)
- Staff held monthly meetings to align efforts and share lessons from Energy Trust outreach staff working to reach trade allies and customers.
- Staff worked with Gaucha Translations to translate trade ally enrollment forms into Spanish.
- While Energy Trust fell just short of this goal, staff expects increased outreach efforts to promote benefits of the Trade Ally Network will continue to support trade ally enrollment in the coming years working closely with trade organizations.

**Going forward:**

- Some business owners need help seeing the benefits of getting into the energy-efficiency field and incorporating energy-efficient upgrades into their businesses. This is support Energy Trust should offer.
- Energy Trust will support minority- and women-owned businesses seeking certification from Oregon's Certification Office of Business Inclusion and Diversity (COBID) to ensure they get access to opportunities associated with certification while enabling better tracking of Energy Trust's trade ally diversity efforts. This also supports Energy Trust's transition away from allowing self-identification to requiring COBID certification for targeted offers to certain trade allies with increased incentives.

**Goal 4: Increase the number of projects completed by minority- and women-owned trade allies by 15% by the end of 2020.**

<b>Baseline</b>	<b>Results</b>	<b>2020 Target</b>	<b>Status</b>
1,150 projects completed by minority- and women-owned businesses in 2017	1,976 projects completed by minority- and/or women-owned businesses in 2020	1,323 projects completed by minority- and women-owned businesses per year in 2019 and 2020	

- Energy Trust completed 723 projects with minority-owned businesses and 1,574 projects with women-owned businesses in 2020. There was some overlap with projects by businesses that are both minority- and women-owned.
- Peak Heating and Air, a minority-owned business, went from 16 projects in 2019 to 104 projects in 2020 thanks to an LED direct-install offer and duct testing projects.
- Energy Trust met the target for 2019, completing 1,678 projects with minority- and/or women-owned businesses along with an additional 664 direct install lighting projects. (Direct install lighting projects are included in the 2020 results above.)

**Going forward:**

- To increase the percentage of incentives paid through minority- and women-owned business contractors, Energy Trust should explore targeted offers that provide value for trade allies while supporting customer leads and savings. Energy Trust has received feedback from trade partners that providing leads to minority-owned contractors could help drive project volume and remove barriers to participation in our programs.
- Energy Trust's bonuses to support customers amid the pandemic were announced and launched quickly to help support economic activity, which was challenging for certain trade allies. In the future, Energy Trust should offer additional resources and engagement to build a pipeline of contractors ready to promote offers as soon as they launch.
  - A contractor development pathway within the Existing Buildings program launching in 2021 will provide technical support, one-on-one training and other benefits for contractors that are certified or will become certified through the pathway.

**Goal 5: Increase the number of contracts executed with minority- and women-owned businesses by 15% by the end of 2020.**

<b>Baseline</b>	<b>Results</b>	<b>2020 Target</b>	<b>Status</b>
48 contracts with businesses identified as diverse from 2016 to 2018	109 businesses that identified as diverse since 2016	104 total contracts with businesses identified as diverse since 2016	

- Staff was made aware of the need to contract with minority-, women- and service-disabled veteran-owned businesses and community-based organizations and encouraged to seek out new firms when entering in contracts for services, supplies or sponsorships. Energy Trust also did more communications and outreach to promote contracting opportunities.
- In the competitive bid process for commercial and industrial programs, bidders had to show an ability to successfully partner with minority-, women- and service-disabled veteran-owned subcontractors to deliver services and submit a plan for subcontracting including the expected dollar value of subcontracts.
- Diverse contractor requirements and language were included in contracting processes for the planning and evaluation and marketing writer pools in 2020.

**Going forward:**

- Better systems are needed to comprehensively track how funds flow through contractors to subcontractors and to what extent contracts for smaller dollar amounts are going to minority-, woman- and service-disabled veteran-owned businesses.

**Goal 6: Increase overall market awareness and understanding of underserved populations through the engagement and deepening of relationships with 50 culturally specific/culturally responsive organizations by the end of 2020.**

Baseline	Results	2020 Target	Status
80 existing relationships with organizations in 2017	20 new relationships and 30 deeper relationships	25 new relationships and 25 deeper relationships with organizations	

- Starting in 2019, Energy Trust staff members were assigned and trained as relationship managers to develop or deepen relationships and learn about the communities and customers they serve. This led to new partnerships and program offers that provide mutual benefits and expanded services to customers:
  - Verde hired dedicated staff to support its collaboration with Energy Trust and is seeking funding from outside sources to further supplement the costs of program delivery.
  - Energy Trust supported Spark Northwest’s Energize South Coast Campaign that resulted in 53 ductless heat pumps installed in 2020 at about half the cost for customers.
- These partnerships aren’t just a way to drive program participation. Instead, staff found working with community-based organizations provided insight into customers, barriers and gaps in Energy Trust offers.
- Staff advanced efforts to reach new customers through partner organizations with the introduction of Community Partner Funding, which allows community-based organizations to offer increased incentives for residential projects.
- COVID-19 stretched organizations’ capacity and limited their ability to work with Energy Trust in 2020. COVID-19 also disrupted operations, with some groups—including the City of Hermiston’s Hispanic Advisor Committee and Latino Business Network in Eastern Oregon—not meeting for the majority of 2020.

**Going forward:**

- More opportunities exist to engage groups in rural communities and communities of color, establish formal and equitable processes for funding, tailor legal documents for work with community agencies and consult with members of the Diversity Advisory Council.
- Energy Trust should develop more marketing efforts with community-based organizations and materials in Spanish.
- Relationship management training will continue. As more staff members and contractors engage with community-based organizations, coordination is needed to ensure working with Energy Trust is easy to navigate.



**Goal 7: Increase the diversity in recruitment and hiring of employees by 25% by the end of 2020.**

Baseline	Results	2020 Target	Status
7.5% of staff identified as people of color at the end of 2017 (8 staff identified as people of color out of 107 total staff)	12% of staff identified as people of color (13 staff identified as people of color out of 109 total staff)	Increase diversity of staff and applicants to be more reflective of Portland demographics (28% of Portlanders identify as non-white)	
	40% of applicants who voluntarily self-reported identified as people of color		
27% of new hires in 2017 identified as people of color (4 new hires identified as people of color out of 15 total new staff hired)	29% of new hires identified as people of color (8 new hires identified as people of color out of 28 total new staff hired)	34% of new hires identify as people of color	

- Energy Trust contracted with Garcia and Associates, an Oregon-based human resources consulting firm focused on diversity and inclusion, to do a comprehensive recruiting strategy. A subsequent effort, launched in 2020, seeks to produce a similar strategy for retaining employees.
- Recruiting and hiring strategies resulted in more people of color advancing to final stage interviews and being hired. These included:
  - Requiring hiring panels have qualified applicants of color in consideration throughout the hiring process (as tracked and monitored by human resources).
  - Asking members of the Diversity Advisory Council to sit on all hiring panels.
  - Requiring hiring managers and hiring panel participants to attend an implicit bias training prior to interviews.
  - Sharing interview questions with applicants prior to interviews to give applicants with little or no industry experience time to prepare.
- Energy Trust partnered with agencies and internship placement programs with successful recruiting strategies to help attract and retain diverse talent. Currently, 62% of interns at Energy Trust identify as people of color (these are not included in the figures above).
- Metrics reflect progress since 2018. Since demographic information is disclosed voluntarily, staff information can change as staff self-disclose.

**Going forward:**

- Diversity, equity and inclusion training opportunities for hiring managers and hiring panels should be expanded.
- Energy Trust should focus on managing and mitigating the effect of COVID-19 on hiring.
- Since agency contractors and interns make up a critical pipeline of qualified applicants for open staff positions, agency partners and internship placement programs must have their own successful recruiting strategies to help attract and retain diverse talent.
- Energy Trust’s recruiting strategies should be evaluated on an annual basis.

**Goal 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.**

2018 Target	Status
Data, baseline and participation analysis is used to refine diversity, equity and inclusion goals and track and report progress to achieving those goals	

- Energy Trust surveyed residential and multifamily customers (including program participants and non-participants) for its 2020 Customer Insights Study with an intentional oversample of key demographic groups. This survey, given every two years, provides the most detailed insight into program efforts, allowing Energy Trust to track progress serving specific groups (e.g., specific race or ethnic groups).
  - Results revealed differences between demographic groups in awareness, information sources, attitudes, barriers and motivations for completing energy-efficiency projects and using Energy Trust services.
- In 2020, Energy Trust expanded its Fast Feedback survey, which is given on a rolling basis to recent program participants, to include more demographic questions for residents, business owners and decision-makers.
- Staff gave presentations on survey results to the Diversity Advisory Council at its 2020 meetings in February, July and November.

**Going forward:**

- Energy Trust will continue to engage stakeholders, the Diversity Advisory Council and community-based organizations to understand what data is meaningful and should be collected.
- Certain program participation goals for 2020 did not easily lend themselves to real-time tracking. Energy Trust will continue to balance trackable metrics with large-scale evaluations and research efforts like the Customer Insights Study that provide a comprehensive framework to measure progress and identify underserved groups.
- Energy Trust will continue to explore how participant demographic information might be collected for offers where customers are not directly receiving an incentive or information is not available (i.e., where incentives are paid to distributors or manufacturers).

**Goal 9: Based on the Intercultural Effectiveness Scale survey, increase cultural responsiveness of all staff and board of directors by 20% by the end of 2020.**

Baseline	Results	2020 Target	Status
Scored 3.79 out of 5 on Intercultural Effectiveness Scale survey in 2015	Scored 3.9 out of 5 on Intercultural Effectiveness Scale in 2019 and 2020	More culturally responsive and inclusive organization	

- Energy Trust used the Intercultural Effectiveness Scale survey to assess the ability of staff and members of its board of directors to work with people from different cultures. In 2019, 90% of staff including contractors and interns took the survey. Board members completed the survey in May 2020. The two groups received an average score of 3.9 out of 5. Results showed a small but positive change overall with notable gains in interpersonal engagement.
- Employees were invited to attend a presentation on organization-wide results and offered one-on-one meetings to discuss their scores and ways to incorporate results into their workplans.
- Human resources staff used the 2019 results to select a suite of trainings that address areas of significant growth potential.

**Going forward:**

- The Intercultural Effectiveness Scale survey is likely not the most appropriate survey for Energy Trust since it is geared to international engagement. Staff will select a new survey to track progress on this goal going forward.

**Goal 10: Increase transparency and community engagement by publishing the Diversity, Equity and Inclusion Operations Plan and progress toward its goals.**

2020 Target	Status
Internal and external stakeholders are aware of and informed of Energy Trust’s diversity, equity and inclusion activities, goals and progress to goals	

- Staff provided regular updates on diversity, equity and inclusion goals and activities in quarterly and annual reports to the Oregon Public Utility Commission and Energy Trust’s board of directors. These reports are posted on Energy Trust’s website at [www.energytrust.org/reports](http://www.energytrust.org/reports).
- Energy Trust launched a web page describing its diversity, equity and inclusion efforts at [www.energytrust.org/diversity](http://www.energytrust.org/diversity). The page materials on goals, baseline data collection, progress reports and Diversity, Equity and Inclusion Operations Plans.
- Energy Trust staff were given frequent updates about diversity, equity and inclusion goals and activities through presentations, internal newsletters and emails.

**Going forward:**

- Energy Trust will continue publishing reports and other communications on diversity, equity and inclusion activities, progress and lessons learned to promote transparency and trust among its stakeholders and customers, including underserved groups.
- Where possible, reports will track qualitative as well as quantitative measures of progress.