

# Midyear 2024 Diversity, Equity and Inclusion Report

This report provides information on progress to meeting the goals identified in [Energy Trust's Diversity, Equity and Inclusion Plan](#). The purpose of Energy Trust's DEI Plan is to ensure customers who have historically been underserved by Energy Trust's programs or who have not directly benefitted from clean energy solutions have meaningful and equitable access to Energy Trust services. This includes but is not limited to people of color, people with low incomes and people living in rural areas.

The plan has five goals and describes desired outcomes for each goal to describe the future state Energy Trust hopes to achieve. In 2023, for 2023. Staff sought feedback from external stakeholders and community members on possible metrics and used their insights to identify metrics to track progress to meeting these goals and outcomes.

The DEI Plan identifies multi-year goals, and the current metrics tell only part of the story. They are not intended to demonstrate Energy Trust's comprehensive efforts to realize all the desired outcomes associated with each of the DEI Plan goals, although they provide insights into some portion of Energy Trust's DEI efforts. As Energy Trust's activities evolve based on community engagement, and as its capabilities and approaches to tracking data improve, metrics and reporting may evolve too to become more robust and tied to emerging areas of focus.

## Goal 1: Increase Representation and Readiness

Outcomes:

- Diverse perspectives and ideas contribute to the creation of equitable solutions to support all communities in realizing the benefits of clean energy solutions.
- Energy Trust has significant resources for BIPOC, low-income and rural community organizations, individuals and businesses to engage with Energy Trust as a form of restorative justice to address the historical disparities in investment in these organizations by Energy Trust since our inception in 2002.
- Energy Trust staff engage diverse communities in a respectful, effective and culturally relevant and responsive manner.

Metric:

- Cultural awareness trainings and events attended by Energy Trust staff.

Status as of midyear 2024:

- Staff members self-reported collectively attending voluntary cultural awareness trainings and events in 2023. These included:
  - the Eastern Oregon Economic Summit focused on rural community needs including tribal economic development
  - a gathering hosted by Lake County Resources Initiative and Sustainable Northwest to connect community organizations serving rural Oregon
  - Coalition for Communities of Color's Summer Soiree to connect with people and organizations serving communities of color in the Portland area
  - South Coast Equity Coalition's annual South Coast Diversity Conference
  - Affiliated Tribes of Northwest Indian's 2024 National Tribal Leaders Climate Summit

- Energy Trust outreach staff attended several events hosted by other organizations to connect with diverse groups; many events were focused on environmental justice communities. Events included Oregon Association of Minority Entrepreneurs' tradeshow, a Hermiston Cinco de Mayo 2024 celebration, Voice of Venezuela's Cultural Afternoon, Oregon Human Development Corporation Farmworker Advocacy Awards Summit and Juneteenth events in Bend, North Portland and East Multnomah County.

## Goal 2: Shift and Share Leadership and Power

### Outcomes:

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

### Metric:

- Number of community members who participated in Energy Trust projects, initiatives or advisory groups to provide input and influence program design. A community member is defined as a person who is not Energy Trust, Program Management Contractor or Program Delivery Contractor staff. (Community members may be compensated for their participation.)

### Status as of midyear 2024:

- Eleven people serve on the Diversity Advisory Council. In 2024, the council has provided input to inform Energy Trust's draft 2025-2030 Strategic Plan, efforts to support diverse businesses in the Trade Ally Network, and use of the Tribal Working Group. One council member also participated in reviewing proposals for an evaluations contract.
- Four community members serve on Energy Trust's Tribal Working Group, which meets regularly with Energy Trust staff to provide input on strategies that will provide greater benefits to tribal customers and increase program participation. In 2024, working group members provided input on Energy Trust's outreach strategies and staff resources to tribal communities and Community Partner Funding opportunities with tribal organizations.

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

### Outcomes:

- Energy Trust contracts with a broad diversity of businesses to support our work and represent a variety of perspectives and approaches.
- Our Trade Ally Network reflects a broad diversity of businesses to better serve all of Energy Trust's customers.
- Energy Trust supports career and business development initiatives that help BIPOC, rural and low-income community members access career development and business opportunities in energy efficiency and renewable energy.
- BIPOC, low-income and rural communities receive focused investments of Energy Trust's technical expertise and funding resources to ensure programs and services are deployed equitably to all customers.

Metric:

- Percentage of expenditures to subcontractors on contracts over \$750,000 (i.e., large contracts) paid to businesses certified as minority-owned businesses, women-owned businesses, emerging small businesses and/or veteran-owned small businesses.

Status as of midyear 2024:

- 19% of payments made to prime contractors on large contracts have gone to certified subcontractors. The percentage of dollars paid to certified subcontractors in each category is: 10% to minority-owned businesses; 9% to women-owned businesses; 9% to emerging small businesses; and 0% to veteran-owned small businesses.
  - Energy Trust uses certifications from Oregon's Certification Office for Business Inclusion and Diversity and the federal Small Business Administration.
  - In 2023, Energy Trust reported on contracts over \$100,000. The change to contracts over \$750,000 reflects changes to [Energy Trust's supplier diversity program](#), which requires prime contractors on large contracts pay certified subcontractors at least 20% of the total value of the contract.
  - In 2024, Energy Trust added a prime contracting program for all contracts over \$10,000 to track dollars awarded to certified contractors.

## Goal 4: Increase Transparency and Accountability

Outcomes:

- Communities and organizations understand how their input and involvement impacts our work.
- Energy Trust is a learning organization where accountability is based on learning from both successes and failures, which are acted on to improve future outcomes.

Metric:

- Energy Trust exceeds its 2024 [Oregon Public Utility Commission performance measure on equity metrics](#).

Status as of midyear 2024:

- The OPUC set equity metrics for Energy Trust in 2024 as part of its annual performance measures for the organization. Energy Trust reported on progress to these measure in its [Midyear 2024 Report to the OPUC](#); final outcomes will be included in its 2024 Annual Report of the OPUC in April 2025.
- The OPUC's equity metrics are the minimum expectations for Energy Trust. Similar to other performance measures set by the OPUC related to energy savings and customer satisfaction results, staff seeks to exceed this minimum.

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

Outcomes:

- Energy Trust has developed the relationships and communication channels needed to continuously understand the evolving needs of communities that have been underserved by Energy Trust in the past.
- Communities have confidence in Energy Trust as an organization that will work collaboratively and in good faith to reach mutual goals, according to the communities' desires and needs.

Metric:

- Number of community engagement activities planned for 2024 and results from those completed engagements.

Status as of midyear 2024:

- Energy Trust is conducting or has completed 20 engagement activities with many more planned for the second half of the year.
  - 13 were focused on priority customer groups and communities, ranging from rural customers and trade allies to renters to BIPOC communities
  - 6 were continuations of activities that started prior to 2024
- Energy Trust's 2024 Diversity, Equity and Inclusion Report will provide more information on these engagements and outcomes.