

Energy Trust of Oregon

Diversity, Equity, and Inclusion Plan

June 2022

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 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
- Year 2022 engagements
- Community engagement goals, outcomes and annual metrics
- Commitment to transparency and accountability

These bodies of work are documented in the following Appendices:

- Appendix A - Notes from Pre-engagement Activities
- Appendix B - 2021 Community Summit Feedback
- Appendix C - 2022 Planned Engagements

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 2022 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 for 2022.

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

¹ Notes 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.

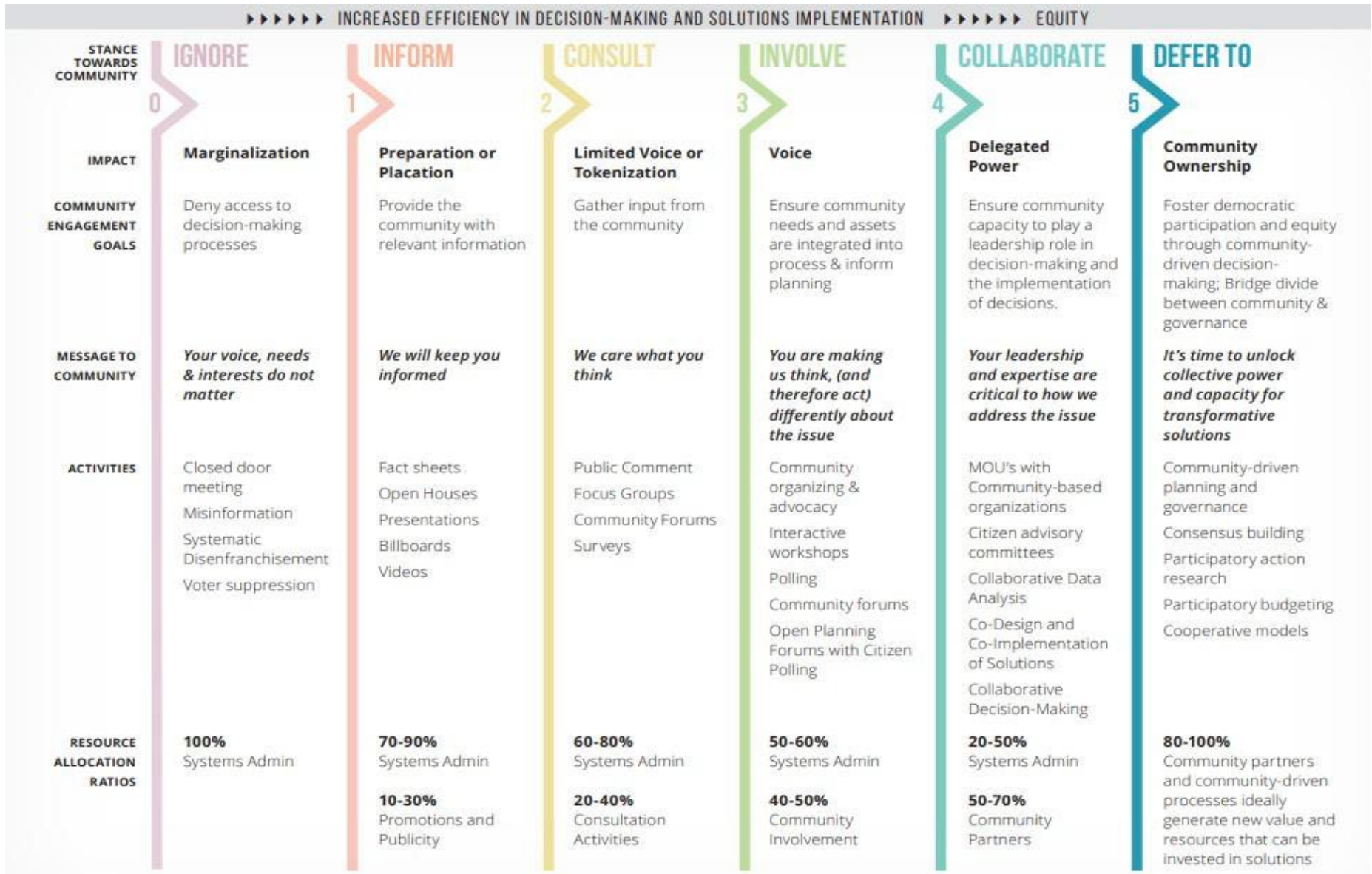
We rely on “The Spectrum of Community Engagement to Ownership” developed by Rosa González of Facilitating Power² to guide our community engagement efforts. The stages represent increasing levels of participation with a community, that span from zero participation to full community ownership. We use the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

²https://d3n8a8pro7vhm.cloudfront.net/facilitatingpower/pages/53/attachments/original/1596746165/CE20_SP_ECTRUM_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*³:

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

³ https://cdn.naaee.org/sites/default/files/eepr/resource/files/community_engagement_-_guidelines_for_excellence_0.pdf

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.

Year 2022 engagements

Using the framework and principles described in the previous section, Energy Trust has identified numerous engagements to pursue in 2022. The development of our annual budget includes engagements for the upcoming year as we continue to evolve and implement our programs. Each of our planned 2022 engagements included in Appendix C is summarized in accordance with the following template. These summaries will be updated as engagements occur, or as planned equity engagements deepen. As new engagements are identified, new summaries will be added.

Summary of Planned Engagement Template

Engagement Title: [Provide a brief descriptive title for this engagement.]

Who are we engaging? [List the specific groups and organizations or the types of groups and organizations involved in this engagement.]

Who will this serve? [Indicate the types of customers underserved by Energy Trust this engagement is anticipated to benefit. Include customer type, market segment, geography, race/ethnicity, income level, etc.]

Timing: [Provide an indication of the timeframe for this engagement.]

Energy Trust staff leads: [List the Energy Trust staff responsible for this engagement.]

Why are we engaging? [Provide some information on the reason for this engagement. Is this discovery? Are we responding to a request or known need? What do we and our partners hope to get from this engagement?]

How we anticipate using the feedback and closing the feedback loop? [Provide an explanation of how the feedback from this engagement is expected to be used. Note how you will let the participants know what you heard and how it influenced our work.]

Outcomes of engagement (notes, projects, referrals, contracts, agreements, etc.) including impacts to our customers. [List the measures of success for this engagement.]

Long-term relationship potential and progress metrics used to assess relationship [Provide an assessment, preferably based on a conversation with the partner about the potential for this relationship and how you will assess its development.]

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 2022 metrics identified in this document will continue to be refined through a process of iterative community engagement. Within each goal, we have proposed various outcomes, or what the future might look like when we are successful, as well as specific metrics or 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 **Outcome** contains **2022 Metrics and Measurements** that we are proposing to track as qualitative and quantitative data in 2022. Energy Trust believes these metrics and measurements will help us track our progress in achieving our goals and outcomes. We will be initiating a series of engagements with the Diversity Advisory Council and various CBOs, contractors and community members to further refine and finalize these metrics and measurements. We anticipate that the proposed metrics will evolve as we engage communities and determine what is important to stakeholders and what is feasible to track. These **2022 Metrics and Measurements** are intended to start intentional and meaningful conversations. In some situations, we anticipate that the 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.

2022 Metrics and Measurements

- 1.1.1. Number and percentage of people from diverse communities (BIPOC and intersecting identities, low-income and rural) represented:
 - a. within Energy Trust staff on all levels of the organization.
 - b. on Program Management Contractor (PMC) and Program Delivery Contractor (PDC) staff and teams.
 - c. on Energy Trust's advisory councils.
- 1.1.2. Number of BIPOC, low-income and rural organizations and community members attending Energy Trust public forums (e.g., board meetings; DAC, RAC and CAC meetings; budget workshops; Diversity Days; etc.).

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.

2022 Metrics and Measurements

- 1.2.1. Dollars invested to support capacity building in community-based organizations serving BIPOC, low-income and rural communities.
- 1.2.2. Dollars invested in stipends, other financial support and accommodations offered to people and organizations to attend meetings and engage with Energy Trust, reported by race/ethnicity, geography and involvement with customers experiencing lower incomes.

Outcome 1.3: Energy Trust staff engage diverse communities in a respectful, effective and culturally relevant and responsive manner.

2022 Metrics and Measurements

- 1.3.1. Number of cultural awareness training and events (e.g., Diversity Days, DEI training, cultural events, etc.) attended by staff.
- 1.3.2. All staff will identify specific DEI goals in their annual work plans, which will be institutionalized into staff job descriptions, and an integral part of employee performance evaluations.
- 1.3.3. Number of staff participating in community organizations (e.g., ethnic chambers, community-based organizations, non-profits, etc.) as board members, volunteers, advisors, etc.

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.

2022 Metrics and Measurements

- 2.1.1. Participation by community members (e.g., DAC members, community-based liaisons, Community Partner Funding designers, etc.) on project and initiative teams within 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.

2022 Metrics and Measurements

- 2.2.1. Number and quality of co-created program offerings with specific communities (or community organizations).
- 2.2.2. Energy savings or generation resulting from these co-created program offerings reported by race/ethnicity, geography and income level.

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.

2022 Metrics and Measurements

- 3.1.1. Annual contract (either direct or subcontract) expenditures, for contracts in excess of \$5,000, paid to businesses certified by the Certification Office for Business Inclusion and Diversity (COBID) as a Minority Business Enterprise (MBE), Women Business Enterprise (WBE), Service-Disabled Veteran Business Enterprise (SDVBE) or Emerging Small Business (ESB), collectively MWESB/SDVBE. Expenditures will be tracked by type of certification and by race/ethnicity and gender of the business owner.
- 3.1.2. Annual contract expenditures, for contracts in excess of \$5,000, paid to businesses that are not COBID-certified, but identify as a BIPOC- or woman-owned business. Expenditures will be tracked by type of identification and by race/ethnicity of the business owner if known.

Outcome 3.2: Our Trade Ally Network reflects a broad diversity of businesses to better serve all Energy Trust customers.

2022 Metrics and Measurements

- 3.2.1. Number and percentage of COBID-certified firms in our Trade Ally Network leading with race and disaggregated by gender and additional intersectionalities.
- 3.2.2. Amount of incentive dollars going to COBID-certified trade ally-supported projects leading with race and disaggregated by gender and additional intersectionalities.
- 3.2.3. Number and percentage of non-COBID-certified Trade Allies that identify as a BIPOC- or woman-owned business leading with race and disaggregated by gender and additional intersectionalities.
- 3.2.4. Number of non-COBID-certified trade allies supported to obtain COBID certification and the amount of funding for that support leading with race and disaggregated by gender and additional intersectionalities.

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.

2022 Metrics and Measurements

- 3.3.1. Amount of funding used to support internships, scholarships and other career development activities for people of color, women, people experiencing low-incomes and rural residents leading with race and disaggregated by gender and additional intersectionalities.
- 3.3.2. Number of individuals supported by career development activities leading with race and disaggregated by gender and additional intersectionalities.

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.

2022 Metrics and Measurements

- 3.4.1. Community Partner Funding
 - a. Incentive dollars paid to community-based organizations through Community Partner Funding reported by race/ethnicity, geography and income level of the customers served.
 - b. Number of completed projects and customers served reported by race/ethnicity, geography and income level.
 - c. Energy savings broken down by demographics (e.g., race/ethnicity, income, age, urban/rural location, etc.).
- 3.4.2. Focused program offers (e.g., manufactured home replacement, no-cost ductless heat pump pilot, renewable low-income programs, Savings Within Reach, small business direct installation, etc.).

- a. Incentive dollars paid through targeted efforts.
 - b. Number of projects completed and customers served.
 - c. Energy savings and generation broken down by demographics/firmographics (e.g., race/ethnicity, income, age, urban/rural location, business size, etc.).
- 3.4.3. Non-incentive offers through partnerships, sponsorships, grant funding, research, etc.
- a. Amount of funding and services provided to organizations that serve BIPOC, low-income, rural and/or small business customers.
 - b. Capacity building activities/projects with community-based organizations.

Goal 4: Increase Transparency and Accountability

Outcome 4.1: Communities and organizations understand how their input and involvement impacts our work.

2022 Metrics and Measurements

- 4.1.1. Community organizations and stakeholders assess the transparency and accessibility of Energy Trust processes.

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.

2022 Metrics and Measurements

- 4.2.1. Energy Trust exceeds Oregon Public Utility Commission (OPUC) performance metrics related to diversity, equity and inclusion.
- 4.2.2. Energy Trust hosts public forums with community stakeholders to assess the success of our engagements on an annual basis to inform future activities.
- 4.2.3. Energy Trust will engage community stakeholders to scope, budget and implement a transparent assessment of DEI activities (both lessons learned and failures) to be conducted in 2023.

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.

2022 Metrics and Measurements

- 5.1.1. Characterization of the effectiveness and mutual objectives of relationships with communities and community-based organizations by level of engagement as defined by the Spectrum of Community Engagement.

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.

2022 Metrics and Measurements

- 5.2.1. Assessment by communities and community-based organizations of the level of engagement as defined by the Spectrum of Community Engagement of their relationship with Energy Trust as compared to where they would like to be.
- 5.2.2. Individuals and community members participate in co-created solutions.
- 5.2.3. Qualitative feedback from participants about their experience during the process.

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.

Appendix A

Notes from Pre-engagement Activities

Groups engaged during the development of the 2022 DEI Plan:

- Ethnic chambers (Native American Chamber, Hispanic Metropolitan Chamber, Philippine American Chamber of Commerce (PACO), Black American Chamber of Commerce)
- Energy Trust Diversity Advisory Council, Renewable Energy Advisory Council and Conservation Advisory Council
- Energy Trust staff DEI Committee
- Energy Trust Existing Buildings program community-based liaisons
- Energy Trust Board Ad-hoc DEI Committee
- Portland General Electric, Pacific Power, NW Natural, Cascade Natural Gas and Avista
- Oregon Public Utility Commission
- Energy Trust staff and leadership
- Energy Trust program implementation contractors

Questions asked through engagements:

1. How can we be most impactful?
2. How do we know our engagement is successful?
3. How do we hold ourselves accountable?
4. Where should we aim to be by the end of 2022?
5. How do we develop community-informed or led programs or activities?

Summary of feedback

Staff considered all feedback provided as we drafted the 2022 DEI Plan. The draft plan was adjusted as we continued to gather feedback. In many cases feedback provided is directly reflected in the goals, outcomes or metrics included. This plan is a living document that will continue to evolve and change as we gather new feedback from communities, staff and stakeholders.

- Would like to see goals to get Black and Indigenous people into jobs and to create wealth in those communities.
- Would like to see Energy Trust provide internships or career pathways to increase visibility or awareness of clean energy jobs for diverse communities.
- Utility, OPUC and other organizations are engaging many of the same communities and organizations. Would like to see coordination of planning and outreach efforts.
- This should be a living plan to allow greater responsiveness to community needs.
- When engaging communities, consider the best medium and approach. Seek to build partnerships with trusted organizations to engage the communities. Build capacity in those organizations and share technical knowledge.

- Ensure that rural communities and customers are addressed through this plan as a unique area of focus.
- Apply human-centered principles in community engagement both internally and externally.
- Ensure that more organizations have a seat at the table and provide compensation and recognition of contributions.
- Seek to develop greater awareness of Energy Trust in the communities you seek to serve as a precursor to community engagement.
- Earmark dollars to specific communities and make direct investments in Black people.
- Establish a metric related to budget spend.
- Address barriers related to language to create more opportunities for participation.
- Focus on environmental justice communities and where there are disproportionate burdens; reduce energy burden for customers.
- When gathering data ensure that the data is serving the benefit of a community rather than extracting data from the community.
- Ensure that programs and services are driven by community needs.
- Ensure that there is accountability for plan achievements and consequences for not meeting goals; consider a third-party role.
- Tell stories rather than meet percentages; describe the real impacts of your efforts.
- Center plan in racial equity.
- Move quickly to make progress.
- The focus on relationship building is important, like the idea of seeing that reflected in the plan. Be intentional in outreach efforts.
- Ensure that this plan is aligned with the development of DEI metrics with the OPUC in 2022 and that implementing this plan is informing the creation of those metrics and changes from HB 3141.
- Ensure that more people of color are reflected in leadership positions at Energy Trust.
- Reduce barriers to participation in programs and services.

To glean lessons learned from previous DEI efforts, staff and contractors were sent a survey to assess their experience implementing Energy Trust's past DEI Plans. There were 23 respondents to the survey. **Some highlights from that survey include:**

- We need to listen to the feelings of communities not represented in our staff. Equity is defined by the community, not by us.
- This work is uncomfortable. It requires hard conversations and can bring up strong emotions. That's OK.
- There's a lot we don't know. Not everyone is at the table yet.
- We need to be intentional and realistic about the data we can collect that informs our progress.
- Even with a strong commitment and resolve, systemic barriers take time to dismantle.

Appendix B

2021 Community Summit Feedback

Engaging customers of color, customers experiencing low incomes and rural customers is a core focus for Energy Trust—and an area of growth and opportunity. In 2021, Energy Trust hosted a series of community summits to hear from community leaders about their experiences, challenges and feedback on how to serve customers more equitably.

Residential Summit Feedback

June 29, 2021

Barriers and Opportunities

Attendees described barriers to participation as lack of affordable options for customers with low incomes (especially given high housing costs) and lack of programs that are designed around needs of communities.

- A product has to be affordable to low-income individuals. **Solar panels and other upgrades are so out of reach for low-income families struggling to put food on the table.** If you could make products affordable, low-income customers will sign up. Otherwise it's a hard sell.
- How do you focus and intentionalize the work on the communities that you're looking to impact? There's a lot of ways to do that. Targeting neighborhoods that are deficient of tree canopy could be one approach. Look at ways to provide access and opportunity to communities that have been historically displaced from being landowners. Look at indigenous communities, Black folks, Asian folks and Latino folks. What is the system in place and what are the barriers within that system that prevent communities of color from participating in these programs? Look at affordable housing providers that provide culturally specific housing, and then look at how they structure programs to serve communities of color. **Look at how we can complement other resources, like affordable housing providers, to allow clean energy to be an opportunity that communities of color can access. As opposed to creating a system and then saying everyone should work with the system we've created.**
- Most people rent from landlords, and they are taking advantage of folks right now. It will be tough to get a renter to buy into a program.
- Energy Trust could help communities with financial help for low-income customers.
- Developing a housing program takes time. **I would like to see a community program for landlords so they can do improvements that benefit renters.** It's a human right to have housing.

Community Needs

The most prevalent and urgent concern expressed was the lack of affordable housing in many communities.

- I asked community leaders about the toughest things we're facing right now in Central Oregon, especially in Bend. It boiled down to our housing crisis. **Housing crisis is huge.** Professionals can't afford housing. **Many BIPOC communities are being displaced.** It's hard for college kids to live here. Landlords are taking advantage of renters right now (by charging high prices). Our utility increased prices when housing costs and cost of living are already high. Bend had no plan for growth so houseless people are not well taken care of. The process for getting a job here is not equitable.
- I became homeless in April. We've been at a motel. **There are no places to rent or to buy. We've been**

looking everywhere, even for a trailer. Ontario is a growing town. Everybody is coming in from Texas and California. It's hard to find a place to live and we don't have the means to do it.

- My house shakes when my dog runs. **It's very expensive to repair the house.** I am thankful for my house, to have a roof. But it is in bad shape. Right now, I know two people who also need a house because there's not a lot of housing here. They've been looking for a house or apartment for more than a year and can't find anywhere to live. Huge lack of housing. Even worse now that wood is expensive. People cannot build new houses. With few homes, rents are going high very quickly. A one bedroom is \$2,000 a month. It's not fair for everything to get so expensive. I hope that you can help here so there will be more housing.
- **Affordable housing crisis is our original pandemic.** If there is a way to build housing units faster, that might be one of the goals that we should look at collectively. **How can we build more units faster?** Using the team at NAMC to help us, figure out better strategies (like modular housing or other housing that can be constructed faster).
- Another impact to low income and minority communities is that many multifamily projects in Portland have large bike rooms. We want a reduction in size of bike room and an increase in electric vehicle charging stations. Then residents could do ride sharing. Multifamily complexes are in areas like North and Northeast Portland—you're saying to residents that you're stuck in these areas because there's not enough parking, limits residents' ability to travel to get to more promising jobs. **Lack of mobility is a big problem for minority communities.**
- There's a housing crisis in the Rogue Valley. Many of my clients there have moved out of state. There's so much need down there. **People are tired of being displaced and are moving out.**

Community Outreach

Attendees advised Energy Trust to listen to communities for guidance, build trust with communities, understand unique community needs and change service delivery models to meet those needs.

- Back to the question of what the community may need from Energy Trust, the pandemic and wildfires have challenged our delivery system at Immigration Counseling Services. Your services are challenged. Think about how you deliver services on a daily basis to meet your marketplace. We had to rethink our system.
- **If your services are underutilized, go further to reach people you're trying to serve. That's important especially after what people have gone through with COVID/wildfires.**
- **There's lack of inclusion in the community.** The city just started developing a diversity, equity and inclusion program in 2019, so they're far behind. Most leaders in my community talked about the lack of acceptance of racism, white fragility, no equitable system. I just met today with the city about how they're trying to help welcome people, but there are bigger organizations who are trying to help that are still acting like gatekeepers of how community leaders should do the work and communicate with community. They are trying to grasp control. We're trying to get the city and other organizations to **sit back and listen to the community for guidance as opposed to taking control.**
- **To benefit communities, address first the needs of the community. Create trust relationships with communities. Every community is different.** You must know the community to identify needs and then address those specific needs. How can I get a benefit when I don't have enough money to get the service? The more trust there is, the more communication and the more learning about needs so you can meet them. It's been inspirational to hear voices of community and their needs. It's made us aware that

there's much to achieve.

- When we have discussions with people of color, we have great ideas and suggestions but then we go back to business as usual. **The challenge to Energy Trust is to take the feedback and turn it into actions and programs.** We have seen a lack of concrete responses from Energy Trust. What's important is that these conversations translate to meaningful actions.

Trade Ally Network

Attendees expressed a lack of opportunities for contractors of color and a need for customized training and support to enable them to participate and thrive in the workforce.

- We would like to see that there's real opportunity for minority contractors. Look at what training programs are offered, how much time is required in those training programs, what's the pipeline of projects available once a contractor is certified. Energy Trust **should intentionally create a program that works for contractors of color, not a one-size-fits-most program that doesn't recognize the disparities that contractors of color face.**
- Exposure for minority contractors is critical because this is a big industry that could be hurtful for women and people of color to be involved in.
- Constructing Hope had its first solar contractor of color start work last month. He graduated from Constructing Hope in 2010 and went to work for Solar City. Constructing Hope got a PCEF grant to plan a green training program to help people of color and people with low incomes become solar contractors. We will work with NAMC (National Association of Minority Contractors) and PBDG (Professional Business Development Group).
- You need to **create a directory for minority contractors who are doing work in energy efficiency** (so we can figure out who is out there).
- How much money has been made by companies that Energy Trust has referred to customers in the solar industry? How much money does Energy Trust bring into trade ally businesses? If you don't know the number of BIPOC solar contractors nor how much money is going to them, how do you know how good of a job you're doing on diversity? Who has received the majority of contracts through your programs through the last several years?

Commercial and Industrial Summit Feedback

July 22, 2021

Main Themes

- Core to PCEF as we invest our resources, is working to diversify the contractor businesses and staff who work on each project to include more people of color, women and people with disabilities and ensure they're provided with good wages and benefits. People are still wrapping their minds around what it means to diversify the contractor pool and workforce, and it will be a long conversation.
- Our 2021 funding round is expected to result in much larger grants with different types of projects. In our inaugural 2020 year, a lot of funding went to residential and multifamily projects. We're now trying to navigate and understand opportunities to support commercial projects and how to make more potential grantees aware of PCEF grants.
- As we think about what it means to scale up PCEF, **nonprofit-owned and -operated buildings like community centers and houses of worship are a key area of opportunity.** These organizations often

rely heavily on volunteer labor and don't have capacity to focus on building operations, but they may have significant operational costs that could be met by the expertise in this room.

- In light of events in the past year, **we see a key opportunity for investment in community resources like cooling centers and clean air centers.** We will target those opportunities and hope people come to see them as community assets, but it might take a while to educate this audience about opportunities for their buildings and what they can do. I hope the people in this room can be part of that solution; PCEF is a resource to fund those opportunities and partner with the programs Energy Trust offers.
- As we gear up to release a lot more funds, I wanted to acknowledge that 40-60% of funds are set aside for energy efficiency and renewable energy projects. **BIPOC-led groups and communities of color tend to hear about these programs last. We want to be intentional in making sure those groups know how PCEF opportunities fit for them.** We know business owners aren't always plugged into this so we're looking for information channels to reach them.
- We also want to recognize that **Energy Trust has certain criteria and we have a different set of criteria, but there's a lot of opportunity coming together to extend our reach** and get into business, buildings and households we typically haven't been able to access.
- We refer to Energy Trust to learn about energy evaluation opportunities. We do provide planning grants up to \$100,000 but that option might not necessarily be the best fit because of the effort involved to get a scope of work for a building. **We're trying to be more strategic in using Energy Trust to help businesses find their best opportunities.**
- Energy Trust and PCEF have both worked with Verde, a community-based organization, on a project to expand access to ductless heat pumps in residences at low- to no-cost. Coordination occurred when there was an opportunity to host a workshop educating residents on the energy- efficiency benefits of ductless heat pumps, especially for low-income households. **The workshop also focused on lifting up minority- and women-owned businesses. This is literally saving lives, especially with the heat events.** This type of collaboration could be an opportunity in the commercial and industrial sectors as well.
- With the heat events, I'm wondering if Energy Trust is planning a campaign for outreach staff to venture out to small businesses and minority-owned businesses and push for more efficient HVAC and other capital upgrades. We all know climate change is here, and I assume it's only going to get worse. As a housing director, I've been working with vendors to get air conditioning into our units, and there was a shortage. We also have trouble getting contractors to work on buildings that are down and out. **I recommend doing direct outreach to potential small business customers and connect them with contractors to do the work.**
- As a contractor, I have a lot of projects that look at Energy Trust dollars, and often some measures qualify for an incentive while others do not. **It would be great if alignment could happen between PCEF and Energy Trust so one entity could support a measure that the other doesn't to bring down overall cost.** This kind of connectivity could make or break a project. There are a lot of projects where leveraging additional funds can close the gap to make it pencil out, and that would have a great impact on our region.

Workforce Development

Attendees stressed the importance of supporting minority- and women-owned contractor businesses to complete more energy projects. Panelists also expressed it is critical to help train and develop new diverse trade

professionals while ensuring they receive good pay and benefits.

- **We can't have sustainability without equity, and we need to make sure the workforce is diversified and has a livable wage. If trade workers are driving the most inefficient vehicle to get to their job because that's what they can afford, we're doing ourselves a disservice.** The architecture and engineering firms can help direct their projects to hire diverse contractors, but we also need to have a diverse workforce that continues to grow as existing workers may retire in the coming years.
- Minority contractors are faced with different challenges, and Metro Construction Career Pathways Project (C2P2) is a regional approach to address that. Hate crimes and harassment have occurred on construction sites. It takes the entire construction sphere to correct this, not just business owners.
- **I suggest putting a process in place to capture metrics about participation by minority and women-owned contractors.** I'm involved in an initiative to define impediments to BIPOC contractors and increase diverse participation on construction projects, including trade and city organizations. We identified showcase projects that have successfully implemented strategies to meet MWESB participation goals. We're now in the process of collecting best practices to share with future project teams. Studying best-case projects helped us clearly define problems and identify ways to remedy them. This method could be applied to energy projects.
- Teaming allows you to get better quality by combining expertise.

Communication and Outreach

Attendees urged Energy Trust to examine and enhance its communication and outreach strategies to communities of color. Recommendations included simplifying technical language and offering materials and outreach support in more languages.

- From a third-party perspective, **energy-related terminology is like a different language.** Empowering the next generation of trade professionals is critical. We also need to recognize the barrier to imparting the energy language and baseline of knowledge. **We need to make it more accessible and usable to the communities where we want to create change.**
- Sustainability and equity are interdependent but are often seen in opposition. I've helped Oregon Association of Minority Entrepreneurs (OAME) learn about energy and how to work with Energy Trust. Green gentrification is a problem, and we need to break down these barriers including the knowledge barrier. **Energy Trust should add mechanisms to forms to track if minority contractors or subcontractors were used, and what portion of the project cost went to them.** I would help support that improvement.
- Many minority-owned commercial businesses in the Jade district aren't aware of energy programs. Getting the message to members of the Asian community in their native languages is a big opportunity. **Energy Trust should be proactive in offering materials and outreach support to Asian communities in their native languages.**
- I was involved in writing a new incentive, and even with a civil engineering background I had a hard time with the back-end process and learning the vernacular to do so. **Energy Trust needs to understand that the energy language is both a barrier and a privilege.** Bring that knowledge to communities that have never been exposed to it.
- **There should be better commercial business representation on advisory committees.** For example, the Conservation Advisory Council doesn't have any small business owners and since some decisions are influenced by the advisory councils, this needs to be looked at.

Trade Ally Summit Feedback

July 28, 2021

Value proposition and challenges of obtaining COBID contractor certification

Panelists discussed the value proposition of obtaining certification from Certification Office for Business Inclusion and Diversity (COBID), which helps BIPOC- and women-owned contractor businesses secure government contracts and other work. Attendees shared insight from their experience that the process of applying for certification is especially challenging for a small business. In many cases, this poses too much of a barrier, either because the value would not be worthwhile compared to the time spent or because time and resources are simply too limited.

- The residential market is the most volatile market. **COBID certification opens opportunities to contractors they may not have known existed.** Their business is placed in a searchable database that project owners seeking a contractor can use. **They can do work for affordable housing builders and the city and county when the renovation market is slow. People look at that list when they are selecting contractors and see it as a way to vet the business.**
- **Energy Trust should incentivize businesses to get certified by providing funding to support the application process,** and then the firm could become a trade ally.
- I see the certification process as to some extent biased because I do not know if white firms have the same requirements. It does require a lot of paperwork. **We have to reach out to organizations like the Black American Chamber of Commerce or Soul District to identify those people who are in the business but not certified. I recommend continuing to reach out to them to identify companies that could benefit.**
- **You have to go back to a system that was constructed by white people. The COBID certification was originally created for state agency projects. It is a very small office certifying the whole state. Wait periods are very long due to the paperwork and documentation requirements.** On average, you are waiting over 120 days to get certified. NAMC is trying to challenge that system and create something to certify people in their own communities that meets them where they are. The COBID system isn't proactive. What we see is people bid shopping among new companies to see if their prices are lower. Relationship building is important to create engagements that are not just transactional.
- There is a delay in processing right now, but some of that is due to staffing, an increase in applicants and waiting for information to complete applications. We are a vetting agency, so we cannot simply take people at their word. Many people are trying to access the certification to secure government contracts, and our obligation is to certify they really are eligible. Nothing is worse than certifying a firm that is not eligible, which takes away opportunities from qualifying firms. We partner with 35 organizations and do weekly outreach to businesses that may benefit from becoming certified. Last year, we did 150 outreach presentations and events and numerous one-on-one trainings and engagements. I am happy to be a resource and will share my contact information.
- Once the certification happened, that is when the floodgates opened for work, because project owners have hiring goals based on those certifications. **Some business owners have a day job and are also trying to get certified. You should recognize that and help streamline the process. Is there something organizations can do to help inform the process, so it happens faster?**
- I recommend working with me to schedule a training with your organization so we can help you understand the process and procedures. It is not as simple as qualifying on an individual level. We have

to adhere to both state and federal rules. I double check the recommendations of my certification specialists. More than half of applicants are being processed within the 90-day window, although there are exceptions, and that is typically because of seeking additional information. Some of our firms are in the appeal process. We have several levels of oversight to ensure our compliance as well.

- **I work too much to think about getting certified. As an independent contractor who is a minority, why should I jump through all those hoops and why would it take 120 days?** I'm trying to grow my business to reach people and help people. When would I have time to go through the application process?
- Maybe all our organizations can seek funding from the legislature to increase staffing in the **COBID office to meet demand** or expedite the certification process.
- I was COBID certified, but it expired. I am still a woman and still a business, still renovating a ton of houses and saving energy. **I do not want to go through the process again because it does not fill a void in the market. Alongside people who go through the process, Energy Trust and partners should consider another pathway and ask the real questions about helping a small business. There are lots of businesses in the Latino community that are not certified and will probably never be certified by COBID. Until we widen our lens to what the burdens are, we will not be able to engage the Latino-owned businesses that are actually doing the work.** My invitation is just to help businesses and forget about the certification. The state and federal entities are going to do what they're going to do, but we're the ones in homes installing energy upgrades. Hopefully, next year when we have this meeting, there will be a lot of new businesses that have taken advantage of what you have to offer.
- There's an application associated with enrolling in the Trade Ally Network. Is there a barrier there? Why have an application for that instead of having it completely open? Are these necessary barriers? **You should be looking at how to supply technical assistance to members and the community at large to get them to where we need them to be to perform on projects.** On solar projects, it is mainly self-generated leads and it takes a lot of work to generate those leads. As a small business, we were a trade ally at one point and recently jumped back in. **It would be helpful to offer small contractors to customers who cold call looking for an installer referral. Ensure they are the one given the leads, that gives them the ability to grow.**
- Changing the certification is a double-edged sword. It could have unintended consequences. If we had different agencies setting up their own certification, that becomes another hoop for a small business to jump through separately from the state certification. **But I do think there are certain business sizes where certification may not be beneficial, like a small business that isn't seeking to work on public projects. We run the risk of eroding and diluting the pool if we do not have checks and balances.** There are bad actors trying to game the system and trying to take away business from true minority- and women-owned businesses. I want to see people do more work and provide resources for firms to be successful.
- Nobody is talking about adding another layer of certification, but to completely remove it. For me, performance is number one. I'm asking Energy Trust to base its support on performance metrics instead of certification. Energy Trust does a good job of sending leads my way. Let the consumer be smart and make the decision.
- What works for one business may not work for another. We have the same goal of protecting the work, how we get there is the conversation.
- I'm in La Grande, and **I want to reiterate the need to provide support to contractors in rural areas**

and be involved in creating a pathway for current staff who are minorities and women to become contractors. We just do not have the bandwidth for that.

- Individuals have created a great business just by relationship building. It sounds good to say any business could do that on its merit, but that's not always possible. Diverse firms are not being hired as general contractors. In Washington, you have to get licensed in each individual county, and it's kind of a nightmare. Without checks and balances, we go back to the good old buddy system.
- The Indigenous Mesoamerican people get forgotten. There's always that gap between Native American and the Hispanic definition that means we don't get to be at the table. Indigenous people have been consistently mis qualified through Hispanic definition.
- I second the comment on certification being based on ability. I have been in business over 20 years and have built relationships, and I am also certified. However, **doing quality work doesn't always equal getting ahead and we haven't grown to the extent some firms have done. People who have been in jail or have recently come to this country do not have those relationships.**
- Having a certification is not enough, but it is a help.

Enhancing Project Support for BIPOC- and Women-Owned Trade Ally Businesses

Attendees stressed that Energy Trust should support BIPOC- and women-owned contractor businesses to complete more energy projects by identifying and removing barriers to accessing energy incentives for their customers. Panelists identified that the administrative burden of completing incentive applications on behalf of customers is one of the main challenges.

- My business does residential projects like windows and insulation; we are applying for incentives multiple times per week. **It takes a lot of office time for my staff to supply additional service to quantify energy savings. It has been positive overall, but it takes time to fill the gap, and therefore takes money out of my pocket.** Especially if the incentive application gets sent back after weeks or months, then I have an upset client.
- **Energy Trust should own its incentive connection with the customer without the trade ally being in the middle, especially for a small business. However, that is not going to stop me from offering that benefit to customers.**
- I have been working in energy efficiency for about a decade and done construction in small commercial buildings. One gap for those projects is the ability to access the larger incentives related to building operations that involve energy modeling. For example, I worked with a small business on a project that had some modeling done by Energy Trust and ended up getting enough incentive dollars to cover half the project cost. Prescriptive incentives are good, but there is more funding available for contractors who may not have capacity to access the larger incentives. **Energy Trust should offer an engineering service for small businesses to help them maximize incentive opportunities through modeled energy savings.**

Workforce Development

Panelists discussed opportunities to help more BIPOC and women participate in the construction workforce. Attendees proposed ways Energy Trust could leverage its energy efficiency and renewable energy experience to educate students preparing to enter the workforce on energy-related architecture, engineering, and construction career options.

- **Create awareness of workforce diversity. If you start to track it, people start to notice it.** What I find

a lot if it is not in the front of a contractor's mind. If they know Energy Trust is talking about this, they may start to think about diversifying their staff. It might not be something to act on today, but they can start to gather information.

- I work at Oregon State University's cultural center and I speak with career development staff about creating mentorship opportunities. **Employers need to develop relationships with students of color before entering the workforce. We only have so much knowledge about certain industries but working with employers could create a bridge to a career.** Mentorship is one option when working with schools.
- The challenge is bigger than just construction, but also architecture and engineering. Architects are not really represented, and there are only 9 or 10 Black architects in the state. I participated in a reach for success program in high school, where I got to look at college programs before graduating. But many kids now are not going to college. **Getting career information into middle schools and high schools would allow us to go more upstream.** NAMC did Construction Career month last October and will do it again this year. We did virtual tours of projects and heard from successful tradespeople who did not go to college. The trades started during the slavery period, but the industry has lost touch with communities of color. There is a myth in families that trade work is "dirty" work, but we need to change that.
- What are we doing for our Latinos? They are making up a huge part of construction staff, up to 80% of the workforce in Latino-owned firms. What are we doing to support training current staff on energy efficiency? Also, it is a way to get them interested in how to start an energy-related construction business and what the opportunities are.
- Workforce development is a trendy word, but this has been an issue forever. Why can't we start in elementary school? My child had an Energy Trust representative come and talk about energy, and she became excited. Kids now are super smart. **Everyone is thinking about college level, but you have a great platform with ratepayers and could try to educate about energy at an early stage.**
- I come from a family of educators. After the age of 10, it becomes very hard to introduce science. Young kids absorb information, and that is a good time to start talking about the trades. Construction is a pathway to tie kids to the world and show them how to build more efficiently. Energy Trust has done a good job reaching out to Latino Built and reaching out in another language.
- **When it comes to education and training, we have a need right now.** The clean energy economy is getting bigger, and the administration needs are getting bigger. In Oregon, it is hard to find an HVAC contractor to work on my projects. **I would like to have a vertical network of minority-owned businesses, but it's hard for us to find that. Some contractors are going to have to adjust their trajectory. The LED lighting markets are slowly going away, but those contractors can pivot into installing controls for small buildings if they receive some training.**
- As a kid, you need to think of opportunities that are not always presented. We need to create a model that makes the space for people to [consider energy construction careers], and recruit businesses to help.
- I remember when high schools were teaching shop and typing. **We have lost those skills. We need to work with our legislature to get those programs back in high schools, and we should be working closely with the local county building and construction trades. Many offer apprenticeship programs, and that is what's really needed.** Our unions would be working with those going through apprenticeship, where you have a required number of hours. **Clean energy is a vast and wide arena, from weatherization to solar to wind, and now is an opportunity to focus training in those areas so we can have people available to do that work.**

Tribal Summit Feedback

July 28, 2021

High value for land, sustainability and self-sufficiency

- **Our history starts from this land, long before 1492 and the United States.** Our language comes from here. Our animals, our plants, our foods, our names.
- We're horse people. We're salmon people. We live off this land. **We only took what we needed.** We followed the seasons. During the springtime, first foods come out. Winter camp breaks. The family bands get together and discuss what we're going to do now. A story takes place; that's our story. They would travel up the river and look for the roots, the celery. They would have a feast. We're glad we made it another year. Our children keep us moving. Our elders teach us everything. They travel up to the mountains. They would follow the foods, the roots and eventually the berries. And when the seasons turn, they turn back around to the river.
- New buildings need to be green. You go outside and smell the smoke. I feel sorry for the next generation and **it's up to us to make a better earth for them tomorrow.** That means building sustainably. Energy Trust has the know-how and resources. They can help facilitate and provide resources day to day.
- We know renewable energy is important for mitigating risk. Creating small grids, making sure communities have their own energy source is important. The other element is energy efficiency— Energy Trust does this well. If we can reduce the demand for energy where possible, we can create more opportunities to meet that demand in ways that are sustainable. **The more we can create energy storage and energy efficiency, the more likely we are to survive future conditions and threats.**

Pride in clean energy investments.

- **We have a very proud example of working with Energy Trust on our Yellowhawk building.** It's the first tribally owned Path to Net Zero building.
- The Confederated Tribes of the Umatilla Indian Reservation has an energy strategies team that meets regularly.
- We have a positive working relationship with Energy Trust. Recently I worked with Oregon Solar and Storage Industries Association and Energy Trust. They were instrumental in developing the Lucky 7 project to replace 18 manufactured home units with efficient models. Energy Trust does their homework. More importantly they educate.
- We are using better quality products that are green or energy efficient. **Quality products last longer. We're thinking long-term.**
- We are trying to be self-sufficient. We have 4000 residents on the reservation. When wind farms took off in Washington, we were an early investor. Now there are hundreds of big turbines, it's caught on. Now you see solar panels. We've spent millions over the last few years. Our Path to Net Zero health clinic, new high school and new education building were all built in the last 15 years to be as efficient as possible. **Not because there's a rebate but because that's our way—efficient use, no waste.**

Importance of relationships and communication

- As a tribal member, communication is a strong issue. Tell us what direction we need to go. We're all on board. All of us, not just individual departments. When we went to California and saw big fields of solar, but we couldn't do that here because of the cost. Maybe now we can afford it. **Communications within**

our own tribe will help us to get going in a positive direction.

- If you want to build something in Eastern Oregon, you have to get materials from across the state. It's an adventure and waiting period to find out what products work or don't work in our region. Some products like air conditioners work in other areas of Oregon where the state is cooler, but here where it's hotter they will click off. **Communicate. See what other tribes are doing and what local entities are working on.** Contractors can tell you what products actually work and that you can get easily.
- **Every tribe is different.** There are nine tribes in Oregon. You need to have this meeting at eight other locations as well. Other communities each have their own ability to partner with you.

Workforce development

- **The biggest hurdles we had were getting outside contractors willing to work on a reservation.** There's always been a good old boys' system. We've always had to rely on a few contractors we knew from the inside, friends or relatives. The tribe has a requirement that we get three job bids. To try and find more contractors, we've put flyers in hardware stores in nearby towns and ads in newspapers.
- We have to have reliable contractors that want to work with us. We're such a small rural area that we have to fight over contractors. The good old boys' system will always be there, but we have to make the best of it. You have to be an extrovert—you have to go out and meet people.

Appendix C

2022 Planned Engagements

Many of these engagements are included in the action plans that accompany the annual budget. This section reflects those planned engagements.

SUMMARY OF ENGAGEMENTS BY TEAM LEAD

COMMUNITY ENGAGEMENT TITLE	TEAM LEAD(S)								
	Commercial	CCS - Outreach	CCS - Trade Allies	DEI Committee	DEI Services	Industrial & Agriculture	Program Marketing	Renewables	Residential
(1) Develop and Implement Existing Buildings Community Engagement Plan	X								
(2) Community Based Liaison Network	X								
(3) Launch Small Business Offering	X								
(4) Joint outreach to Community Based Organizations for small business offerings by EB and Lighting	X								
(5) Launch Affordable Multifamily SEM cohort	X								
(6) Contractor Development Pathway			X						
(7) Solar Workforce Diversity								X	
(8) BIPOC Solar Ambassadors								X	
(9) Wallowa Community Energy Planning								X	
(10) Expand Community Partner Funding model to serve multifamily and small businesses	X								X
(11) New Buildings program training and education events	X						X		
(12) Women and minority design and construction professionals sponsorships	X						X		
(13) Direct Install Lighting Offer						X			
(14) Industrial and Agriculture sector focus groups						X			
(15) MWESB/SDV capacity building					X	X			X
(16) MWBE Contractor Support									X
(17) Rental Sector Engagement									X
(18) Community Partner Funding (CPF)									X
(19) Community Action Agency Collaborations									X
(20) Hispanic Customer Engagement									X
(21) Supplier Diversity Program Orientation					X				
(22) "How to Work with Energy Trust" webinar					X				
(23) Oregon Public Utility Commission DEI Measure Development									
(24) Chambers with a focus on outreach to diverse businesses		X							
(25) DEI Plan – 2022 metrics outreach				X					
(26) Rural leaders attending rural focused events		X							
(27) Rural Communities		X							

SUMMARY OF ENGAGEMENTS BY CUSTOMER FOCUS

COMMUNITY ENGAGEMENT TITLE	CUSTOMER FOCUS												
	Communities	Contractors	Homeowners	Renters	Small Businesses	BIPOC	Disabled	English as Second Language	Immigrant/Refugee	Low-Income	Women	Rural	Urban
(1) Develop and Implement Existing Buildings Community Engagement Plan					X	X	X	X		X		X	
(2) Community Based Liaison Network					X	X	X	X		X		X	
(3) Launch Small Business Offering					X	X	X	X		X		X	
(4) Joint outreach to Community Based Organizations for small business offerings by EB and Lighting					X	X	X	X		X		X	
(5) Launch Affordable Multifamily SEM cohort				X						X			
(6) Contractor Development Pathway		X				X	X	X				X	
(7) Solar Workforce Diversity		X				X					X		
(8) BIPOC Solar Ambassadors			X			X		X	X				X
(9) Wallowa Community Energy Planning	X											X	
(10) Expand Community Partner Funding model to serve multifamily and small businesses				X	X	X	X	X		X		X	
(11) New Buildings program training and education events		X				X					X	X	X
(12) Women and minority design and construction professionals sponsorships		X				X					X		
(13) Direct Install Lighting Offer					X	X	X			X	X	X	
(14) Industrial and Agriculture sector focus groups					X	X	X			X	X	X	
(15) MWESB/SDV capacity building		X				X	X				X		
(16) MWBE Contractor Support		X				X	X				X		
(17) Rental Sector Engagement				X		X				X		X	
(18) Community Partner Funding (CPF)			X	X		X	X			X		X	X
(19) Community Action Agency Collaborations			X	X						X			
(20) Hispanic Customer Engagement			X	X		X							
(21) Supplier Diversity Program Orientation		X				X	X				X		
(22) "How to Work with Energy Trust" webinar		X				X	X				X		
(23) Oregon Public Utility Commission DEI Measure Development													
(24) Chambers with a focus on outreach to diverse businesses					X	X		X	X			X	X
(25) DEI Plan – 2022 metrics outreach	X	X	X	X	X	X	X	X	X	X	X	X	X
(26) Rural leaders attending rural focused events	X	X	X	X	X							X	
(27) Rural Communities	X	X	X	X	X							X	

Engagement Title: (1) Develop and Implement Existing Buildings Community Engagement Plan

Who are we engaging? As a formal deliverable in the Existing Buildings Program 2022 Statement of Work, the Community Based Liaisons, as sub-contractors to the PMC TRC, will lead the development of a Community Engagement Plan, which will include input from our community to inform how they want us to engage.

Who will this serve? An emphasis will be placed on reaching Black, Indigenous, and people of color (BIPOC), people with disabilities, customers for whom English is not their first language, customers living in rural communities, and customers navigating low incomes.

Timing: The kickoff for this work will be in February 2022. The timeline will be determined after kickoff.

Energy Trust staff leads: Kate Wellington, Wendy Gibson

Why are we engaging? We want to build trust with communities who have been historically underserved, and understand what barriers exist for them to access our programs, so that we can remove those barriers. Through this learning, we also hope to build relationships and gather ideas from our community so that we can co-create program offers that will meet their needs.

How we anticipate using the feedback and closing the feedback loop? Ongoing engagement will be part of the Plan, including communicating back to our community what we heard and the impacts their contributions helped result in.

Outcomes of engagement (notes, projects, referrals, contracts, agreements, etc.) including impacts to our customers. Build trust with communities who have historically been underserved through our standard programs, develop relationships, build capacity, and result in clean energy projects.

Long-term relationship potential and progress metrics used to assess relationship TBD

Engagement Title: (2) Community Based Liaison Network

Who are we engaging? Community Based Liaisons (CBLs) are leaders and experts from our community who support the Existing Buildings Program in institutionalizing equity in program designs, development of offerings, and engaging with our community. CBLs both are our community members and act as advisors and outreach for reaching their communities.

Who will this serve? Emphasis placed on increasing program services and engagements for BIPOC, people with disabilities, customers for whom English is not their first language, customers living in rural communities, and customers navigating low incomes.

Timing: Ongoing (launched in 2020)

Energy Trust staff leads: Wendy Gibson, Kate Wellington

Why are we engaging? Largest emphasis on learning opportunity – CBLs provide insights and advise us in equity and community engagement, and conduct outreach and engagement activities, as well as helping us learn about customer challenges and barriers to participation.

How we anticipate using the feedback and closing the feedback loop? Meaningful feedback loops are inherently part of the CBL model; we meet weekly and try to report back on anything that happened outside of our weekly meetings. We are still working on this and hope to strengthen this aspect of the network in 2022.

Outcomes of engagement (notes, projects, referrals, contracts, agreements, etc.) including impacts to our customers. Equity centered in all Existing Buildings program designs/offerings; Equity lens applied, outreach happening in meaningful ways to communities who have not been served by Energy Trust.

Long-term relationship potential and progress metrics used to assess relationship TBD

Engagement Title: (3) Launch Small Business Offering

Who are we engaging? This offering will be available to small businesses (defined as 20 or fewer employees, or in sites smaller than 20,000 square feet), with an emphasis on serving businesses owned BIPOC, people with disabilities, customers for whom English is not their first language, customers living in rural communities, and customers navigating low incomes. The offering will be delivered through a closed Trade Ally pool, with selection priority for COBID-certified contractor firms.

Who will this serve? Black, Indigenous, and people of Color (BIPOC), people with disabilities, customers for whom English is not their first language, customers living in rural communities, and customers navigating low incomes.

Timing: RFQ for Trade Ally recruitment posted 1/26, launching to customers mid-March 2022.

Energy Trust staff leads: Kate Wellington, Wendy Gibson

Why are we engaging? Support installation of energy efficiency projects at small businesses that otherwise cannot access our program offerings; generate business and build capacity with Trade Ally firms owned by Black, Indigenous and People of Color.

How we anticipate using the feedback and closing the feedback loop? The Trade Allies participating in this offering will meet with the Program on a regular basis to share lessons learned and provide meaningful input into the ongoing evolution of this offer as we learn. The program also intends to reach out to customers to learn about experience with the offering and identify additional opportunities for clean energy for those customers. The intention is that this offering enables us to build trust and relationships with both customers and trade allies.

Outcomes of engagement (notes, projects, referrals, contracts, agreements, etc.) including impacts to our customers. Increased

project uptake for customers who historically have not accessed our programs, increased projects completed through COBID-certified contracting firms, more COBID-certified Trade Allies in the TA network, investments made directly benefiting businesses in communities with lower participation rates. Establish relationships and trust with communities.

Long-term relationship potential and progress metrics used to assess relationship TBD

Engagement Title: (4) Joint outreach to Community Based Organizations for small business offerings by EB and Lighting

Who are we engaging? Community Based Organizations (including Business Chambers) – jointly conducted by Existing Buildings and Business Lighting programs. There is a milestone in both programs' contracts to conduct joint outreach to a minimum of 20 CBOs in 2022.

Who will this serve? Small Business Offering and Lighting Direct Install will be available to small businesses (defined as 20 or fewer employees, or in sites smaller than 20k SF), with an emphasis on serving businesses owned by Black, Indigenous, and People of Color (BIPOC), People with disabilities, customers for whom English is not their first language, customers living in rural communities, and customers navigating low incomes.

Timing: Beginning February 2022

Energy Trust staff leads: Kate Wellington

Why are we engaging? Promote offerings that have been designed to reach communities served by these CBOs

How we anticipate using the feedback and closing the feedback loop? Not clear yet.

Outcomes of engagement (notes, projects, referrals, contracts, agreements, etc.) including impacts to our customers.

Relationships with CBOs, more participation in Lighting and non-lighting Small Business offerings

Long-term relationship potential and progress metrics used to assess relationship TBD

Engagement Title: (5) Launch Affordable Multifamily SEM cohort

Who are we engaging? Affordable Housing Organizations, residents of affordable housing, and CBO (Community Energy Project). Design activities for this offering in 2021 included consulting with CEP and doing voice of customer interviews with affordable housing providers. In 2022 CEP will continue to consult and be delivery for tenant workshops.

Who will this serve? Customers experiencing low-incomes

Timing: Launching in Q1 2022

Energy Trust staff leads: Kathleen Belkhat

Why are we engaging? Expanding our SEM model to serve affordable housing, so that we can bring the benefits of SEM to both affordable housing providers and residents.

How we anticipate using the feedback and closing the feedback loop? Ongoing cohort model

Outcomes of engagement (notes, projects, referrals, contracts, agreements, etc.) including impacts to our customers. SEM savings, workshops and materials delivered directly to tenants, learning more about the needs and barriers at affordable housing sites, reducing energy use to help tenants save on energy bills and alleviate energy burden for those most impacted by it.

Long-term relationship potential and progress metrics used to assess relationship TBD

Engagement Title: (6) Contractor Development Pathway

Who are we engaging? Professional Business Development Group (PBDG) who is contracted with Energy Trust to support the delivery of this offer.

Who will this serve? COBID-eligible firms who have not gotten COBID certified yet.

Timing: Launched in 2021 and continuing in 2022

Energy Trust staff leads: Cameron Starr

Why are we engaging? Support COBID-eligible firms to get certification

How we anticipate using the feedback and closing the feedback loop? Ongoing cohort model

Outcomes of engagement (notes, projects, referrals, contracts, agreements, etc.) including impacts to our customers. Increased number of COBID-certified firms in Energy Trust territory, increased number of COBID-certified Trade Allies, increased projects/capacity w/COBID-certified TAs and more projects done with their communities

Long-term relationship potential and progress metrics used to assess relationship TBD

Engagement Title: (7) Solar Workforce Diversity

Who are we engaging? Pre-apprenticeship programs managed by Constructing Hope, Oregon Tradeswomen and Leaders Become Legends along with prospective MWESB solar trade allies.

Who will this serve? Women and Black, Indigenous, and people of color (BIPOC) community members looking to find a career in the solar industry. Community-based organizations (CBOs) that provide pre-apprenticeship services to address barriers for people of color and woman entering the trades. MWESB contractors interested in adding solar installation to their businesses.

Timing: 2021-2023+

Energy Trust staff leads: Jeni Hall, Bayo Ware, Dave McClelland

Why are we engaging? Program has budget to support new partnerships that create opportunities for woman and people of color entering the solar workforce. Program is engaging with pre-apprenticeship programs to better understand how to support CBOs and build on their current work. We are meeting with prospective solar trade allies to support recruitment and better understand barriers for MWESB businesses.

How we anticipate using the feedback and closing the feedback loop? Anticipated outcomes will require CBO co-creation.

Outcomes of engagement (notes, projects, referrals, contracts, agreements, etc.) including impacts to our customers. Ideally, engagement will result in partnerships or direct investment in CBO programs. Possible outcomes of the partnerships could include internship sponsorship and placement of program graduates at solar trade ally companies and/or funding to develop solar-focused curriculum. Broader goal is more woman and BIPOC solar workers and more minority- and women- owned solar trade allies.

Long-term relationship potential and progress metrics used to assess relationship TBD

Engagement Title: (8) BIPOC Solar Ambassadors

Who are we engaging? The African American Alliance for Homeownership (co-lead), Verde (co-lead), Portland Community Reinvestment Initiative (supporting partner), Community Energy Project (supporting partner), Solar Oregon (supporting partner), Unite Oregon, Clackamas Chapter (supporting partner) and Adelante Mujeres (supporting partner).

Who will this serve? African American, Hispanic, immigrant and refugee homeowners living in the Portland metro area

Timing: 2022-2023

Energy Trust staff leads: Bayo Ware and Lizzie Rubado

Why are we engaging? Building awareness and education in BIPOC communities to increase participation in solar, building and funding CBO capacity to engage in clean energy work more effectively, helping partners leverage outside funding, to be a better partner/co-create something new that is led by community, better understand needs and barriers for these specific communities

How we anticipate using the feedback and closing the feedback loop? N/A

Outcomes of engagement (notes, projects, referrals, contracts, agreements, etc.) including impacts to our customers: contracts, new funding, culturally specific curriculum in English and Spanish, recruitment materials, performance of community outreach and engagement in target communities by trained ambassadors, partner-developed Solar Roadmap for BIPOC customers, 10+ trained BIPOC solar ambassadors

Long-term relationship potential and progress metrics used to assess relationship TBD

Engagement Title: (9) Wallowa Community Energy Planning

Who are we engaging? Contracted with Wallowa Resources Community Solutions, Inc. (WRCSI) as an independent contractor to provide consultant services to assist Wallowa County with the development of a Community Energy Strategic Plan ("CESP") and replicable template of the process for use with other Oregon communities. The goal is to co-create a replicable, community-led energy planning process.

Who will this serve? Customers in a rural community. Contract includes direction for the contractor to ensure that underrepresented populations within the community are part of the planning process, specifically during the stakeholder engagement work.

Timing: This project is ongoing through August 1, 2023

Energy Trust staff leads: Kyle Petrocine

Why are we engaging? We have observed that rural communities in Oregon face persistent economic strain and a lack of equitable access to capital, resources and services, thus leaving these communities less prepared and uniquely susceptible to natural and human-made disasters. We are also aware that rural communities have historically been underserved by Energy Trust. Through this process, we are hoping to learn how to better assist rural communities in developing comprehensive energy planning while also increasing these communities' access to Energy Trust's programs and resources.

How we anticipate using the feedback and closing the feedback loop? The scope of work requires opportunities to share learnings and feedback, both as each individual task is completed as well as a summary of learnings after the CESP is completed. The final task required is a review and assessment of the CESP process, which includes a summary of lessons learned, recommendations for improving the planning process and, at Energy Trust's discretion, presenting the documentation above at up to three stakeholder meetings.

Outcomes of engagement (notes, projects, referrals, contracts, agreements, etc.) including impacts to our customers. Lessons learned from each step/task outlined in the scope of work, which can be applied in future iterations of community energy planning. Specific deliverables for each task in the scope of work. A CESP developed for Wallowa County. A blueprint for implementation of the CESP, including opportunities to integrate CESP into other planning and budgeting efforts.

Long-term relationship potential and progress metrics used to assess relationship TBD

Engagement Title: (10) Expand Community Partner Funding model to serve multifamily and small businesses

Who are we engaging? CBOs participating in current Community Partner Funding (CPF) efforts with Residential and would like to reach additional CBOs not currently participating. Examples of current CBOs include Verde, Community Energy Project, and others participating in the Residential CPF offer.

Who will this serve? Will prioritize CBOs who serve the following communities: BIPOC, people with disabilities, customers for whom English is not their first language, customers living in rural communities, and customers navigating low incomes.

Timing: Engagement started in Fall 2021 – ongoing throughout 2022.

Energy Trust staff leads: Kate Wellington, Ryan Crews

Why are we engaging? Become better partners, provide funding and build capacity for organizations who are serving customers we hope to reach, invest in organizations and communities.

How we anticipate using the feedback and closing the feedback loop? Ongoing efforts mean regular feedback, also intend to co-create CPF ideas for reaching small businesses directly with some CBOs.

Outcomes of engagement (notes, projects, referrals, contracts, agreements, etc.) including impacts to our customers. Serve multifamily units through Residential CPF, add measures and strategies to serve small businesses through CPF model, result in co-created offerings between Energy Trust and CBOs.

Long-term relationship potential and progress metrics used to assess relationship TBD

Engagement Title: (11) New Buildings program training and education events

Who are we engaging? Women, minority and regional attendees at New Buildings program training and education events

Who will this serve? The trainings will be promoted through LinkedIn and by building relationships through strategic organizational sponsorships (see next engagement summary). Event speakers will reflect the race, gender and location of the target audience. The program will continue to host events virtually and record some for on-demand viewing, to create flexibility for professionals who have competing demands on their time. Example events and timeline:

- Net Zero Emerging Leaders Internship: Grant applications are assessed based on multiple criteria including the firms' practices, goals or strategies for hiring specific to diversity, equity and inclusion, and how the firms encourage and support diverse perspectives so that future building designs may more likely meet the needs of all Oregonians.
- Multifamily Housing Panel (includes affordable multifamily e.g., Burnside Boardwalk)
- Allies for Efficiency: Midtown Place and Phoenix Crossing by Housing Works project story is affordable multifamily housing outside of Portland metro.
- NSBE Pro-PDX event (National Society of Black Engineers Portland Professionals)

Timing: New Buildings will host 15-20 training and education events this year.

Energy Trust staff leads: Shelly Carlton, Mana Haeri

Why are we engaging? To expand the diversity of the New Buildings training audience and improve diversity and inclusion in program engagement at the project level. To further advance the program's market transformation vision to *transform Oregon's building design and construction practices so that low-energy buildings become commonplace and accessible to everyone.*

How we anticipate using the feedback and closing the feedback loop? New Buildings requests a voluntary post event survey and uses that feedback to inform future event planning and logistics.

Outcomes of engagement (notes, projects, referrals, contracts, agreements, etc.) including impacts to our customers. Increase participation of minority and women attendees at the program's Training & Education events to equal 15% of total annual attendees; this is aligned/slightly ahead of the market potential within the design and construction industry given the makeup of registered professionals in Oregon.

Long-term relationship potential and progress metrics used to assess relationship TBD

Engagement Title: (12) Women and minority design and construction professionals sponsorships

Who are we engaging? Women and minority design and construction professionals through Energy Trust sponsorship with National Organization of Minority Architects Portland (NOMA PDX) and National Society of Black Engineers Portland Professionals (NSBE Pro-PDX)

Who will this serve? Women and minority design and construction professionals

Timing: 2022 annual sponsorships are in place

Energy Trust staff leads: Shelly Carlton, Mana Haeri

Why are we engaging? To expand the diversity of the New Buildings training audience and improve diversity and inclusion in program engagement at the project level. To further advance the program's market transformation vision *to transform Oregon's building design and construction practices so that low-energy buildings become commonplace and accessible to everyone.*

How we anticipate using the feedback and closing the feedback loop? Through sponsorships the program aims to build relationships, become better partners in the market, learn about target market barriers and opportunities, amplify other organizations with mutually beneficial goals. Specifically, we will hear firsthand feedback on barriers to program engagement and pursuing energy efficiency.

Outcomes of engagement (notes, projects, referrals, contracts, agreements, etc.) including impacts to our customers. The program will gain the value of long-term relationship building and direct access to our core DEI audience. The sponsor will gain a market partner that supports advancement of their goals, and direct access for member to training, education and program contacts.

Long-term relationship potential and progress metrics used to assess relationship TBD

Engagement Title: (13) Direct Install Lighting Offer

Who are we engaging? Small Businesses with 20 or fewer employees or less than 20,000 square feet. Community Service Providers/Producers whose outreach is driven and based on the organization's work and who are local to the community but are not part of a nation-wide organization. The community Service Provider/Producers must provide or be:

- Food, housing, health, economic, or social services (at a free or reduce cost) OR
- A religious center (place of worship), does not include private schools OR
- A community center OR
- Provide Affordable Housing whose outreach is driven and based on the following organizational services: Health Services (including healthcare access and addiction recovery), Economic Stability (including job training/placement, youth/family support, childcare) or Education and Skill Development (youth programs, early childhood education)

The program is approaching engagement with these customers through different tactics:

- Working alongside the Commercial non-lighting program to approach CBOs with both the lighting and non-lighting small business offers. The program is working on scheduling CBO meetings for 2022 right now.
- Working with the PGE 838 team to generate small business leads
- Working with customers through warm leads from existing relationships
- Energy Trust marketing efforts

Who will this serve? Small businesses with a focus on BIPOC, Women, Veteran and Disability owned businesses and on businesses located in rural and low-income areas

Timing: All of 2022

Energy Trust staff leads: Siletselwe Dlamini

Why are we engaging? The program is focusing its efforts with BIPOC, Women, Veteran and Disability owned businesses and business located in rural and low-income areas because they have historically been underserved with Energy Trust. Also, as we engage with community-based organizations, we are trying to learn more about these customers and how to serve them better.

How we anticipate using the feedback and closing the feedback loop? We will use the feedback to evolve the offer in a direction that will best serve our focus customers. Examples: Assess how ET defines "small business" and does it resonate with customers; Better understand instances when customers do not know of Energy Trust or do not trust the *free* lighting offer; How to better engage and build trust with CBOs leaders. If the response/action lies with the program, the program will collaborate with Commercial non-lighting and Industrial to see what learnings we can share and how to evolve our offers. If the response/action lies with Energy Trust Leads (DEI, Marketing, Ops), the information will be shared and action requested. The program will also report back to the parties who provided the feedback along with the action taken.

Outcomes of engagement (notes, projects, referrals, contracts, agreements, etc.) including impacts to our customers. Increase participation with underserved customers. Lower customers energy bills. Build trust with Energy Trust. Open door to other savings opportunities. Build confidence with customers that they made positive environmental choice.

Long-term relationship potential and progress metrics used to assess relationship TBD

Engagement Title: (14) Industrial and Agriculture sector focus groups

Who are we engaging? The Industrial and Agriculture sector is planning engagements with two focus groups: past Production Efficiency participants or customers who have not participated in the past that are small Businesses with 20 or fewer employees and are located in rural areas and past Production Efficiency participants or customers who have not participated in the past that are owned or led by Black, Indigenous, Latino, Asian, Women, Veterans and/or people with disabilities, or whose first language is not English.

Who will this serve? Small businesses; Minority, Women, Veteran and Disability owned businesses; and businesses located in rural and low-income areas.

Timing: Q1-2 2022

Energy Trust staff leads: Kirstin Pinit

Why are we engaging? The feedback will help us to better understand the needs and barriers of these customers and to develop relationships with people and organizations who will co-create new approaches or offerings for these customers.

How we anticipate using the feedback and closing the feedback loop? We plan to follow up with focus group participants to recap what we heard from them, and if there is interest, continue to build relationships with those who are interested in collaborating with us.

Outcomes of engagement (notes, projects, referrals, contracts, agreements, etc.) including impacts to our customers. TBD

Long-term relationship potential and progress metrics used to assess relationship TBD

Engagement Title: (15) MWESB/SDV capacity building

Who are we engaging? Minority and women-owned firms interested in becoming an industrial or residential PMC or PDC

Who will this serve? Minority, women owned, service disabled

Timing: RFPs will be released early March and April with decisions made by July and August

Energy Trust staff leads: Tyrone Henry, Kirstin Pinit, Marshall Johnson

Why are we engaging? Expand economic development opportunities for businesses that have not had the opportunity to participate in our programs. Diverse contractors will allow us to better serve diverse industrial and residential customers and communities.

How we anticipate using the feedback and closing the feedback loop? Outcomes of engagement (notes, projects, referrals, contracts, agreements, etc.) including impacts to our customers.

Outcomes of engagement (notes, projects, referrals, contracts, agreements, etc.) including impacts to our customers. Minimum 20% of contract spend to MW/SDVE/ESB businesses.

Long-term relationship potential and progress metrics used to assess relationship TBD

Engagement Title: (16) MWBE Contractor Support

Who are we engaging? Minority and women owned contractors and associations

Who will this serve? Minority and women owned contractors and associations

Timing: Regular check-ins for all minority/women-owned trade allies from their regional Account Managers (every 1-2 months). Attendance at LatinoBuilt, OAME, NAMC meetings and events (quarterly).

Energy Trust staff leads: Residential Team

Why are we engaging? To build awareness of Energy Trust resources, find new contractors to enroll as trade allies, and better understand barriers to participation.

How we anticipate using the feedback and closing the feedback loop? TBD

Outcomes of engagement (notes, projects, referrals, contracts, agreements, etc.) including impacts to our customers. Increased diversity of our Trade Ally network.

Long-term relationship potential and progress metrics used to assess relationship TBD

Engagement Title: (17) Rental Sector Engagement

Who are we engaging? rental associations, landlords and renters

Who will this serve? Rural, low-income and communities of color who rent their homes or apartments

Timing: Rental Associations Meetings (quarterly), Energy Trust spotlight at National Association of Rental Property Managers meeting (June), and interviewing contractors, tenants, and landlords for feedback on DHPP (Q1)

Energy Trust staff leads: Residential Team

Why are we engaging? To share awareness of Energy Trust resources, and better understand rental sector needs to inform enhanced program design.

How we anticipate using the feedback and closing the feedback loop? TBD

Outcomes of engagement (notes, projects, referrals, contracts, agreements, etc.) including impacts to our customers. Enhanced program design

Long-term relationship potential and progress metrics used to assess relationship TBD

Engagement Title: (18) Community Partner Funding (CPF)

Who are we engaging? Trusted community-based organizations

Who will this serve? Communities of color, rural communities, indigenous communities, people experiencing lower incomes, as well as some veterans and people experiencing disabilities.

Timing: 2022 engagement activities include:

- Gauging CPF Partners Interest in the 'No-Cost DHP' Initiative (February/March)
- Mid-Year CPF Survey and Listening Sessions (May) proposed as survey with an optional discussion meeting with each enrolled Community Partner to identify barriers and needs and improve CPF program design.
- Budget Forecasting Meetings with CPF Community Partners (August) to collaboratively forecast with enrolled Community Partners to define 2023 budget needs and update 2022 budget goals.
- Developing a 'CBO Track' for the TA Forum (November) to allow for Community Partner collaboration, discussions, sharing best practices, etc.

Energy Trust staff leads: Residential Team

Why are we engaging? To reach communities of color, rural communities, indigenous communities, people experiencing lower incomes, as well as some veterans and people experiencing disabilities

How we anticipate using the feedback and closing the feedback loop? TBD

Outcomes of engagement (notes, projects, referrals, contracts, agreements, etc.) including impacts to our customers. TBD

Long-term relationship potential and progress metrics used to assess relationship TBD

Engagement Title: (19) Community Action Agency Collaborations

Who are we engaging? Community Action Agencies

Who will this serve? Customers experiencing low incomes

Timing: Attend and Present at OECA Meetings (Quarterly), submit YCAP Proposal to the OPUC and begin Collaboration (February), submit Proposals for CAO and YCAP for PY 2022-23 (October)

Energy Trust staff leads: Residential Team

Why are we engaging? To coordinate our programs with those of Community Action Agencies to increase the reach to customers experiencing low incomes.

How we anticipate using the feedback and closing the feedback loop? TBD

Outcomes of engagement (notes, projects, referrals, contracts, agreements, etc.) including impacts to our customers. TBD

Long-term relationship potential and progress metrics used to assess relationship TBD

Engagement Title: (20) Hispanic Customer Engagement

Who are we engaging? Various organizations and events

Who will this serve? Hispanic communities throughout Oregon

Timing:

- El Grito event (Portland in September)
- Fiesta Mexicana event (Woodburn)
- LatinoFest (Madras in September)
- Hispanic Metro Chamber Meetings (quarterly)
- Latino Community Association, potentially including, Gala De Oro (June) and the Empowering Families Luncheon (December)

Energy Trust staff leads: Residential Team

Why are we engaging? The Hispanic community is growing rapidly in Oregon. The Energy Trust Residential Program plans to table at events and attend meetings within the Hispanic community to build awareness of Energy Trust offerings and better understand needs of the communities. Energy Trust Residential will also be conducting CBO outreach to promote the upcoming Mi Comunidad webpage and Bonus incentive.

How we anticipate using the feedback and closing the feedback loop? TBD

Outcomes of engagement (notes, projects, referrals, contracts, agreements, etc.) including impacts to our customers. TBD

Long-term relationship potential and progress metrics used to assess relationship TBD

Engagement Title: (21) Supplier Diversity Program Orientation

Who are we engaging? Any firms interested in proposing to future Energy Trust solicitations with a focus on current and historical entities that have contracted with us.

Who will this serve? MWESB/SDVBE firms

Timing: Q2 or Q3 based on implementation of supplier diversity tracking system

Energy Trust staff leads: Tyrone Henry

Why are we engaging? To provide an orientation to potential proposers about the new requirements based on our supplier diversity program and to encourage them to start networking with MWESB/SDVBE firms.

How we anticipate using the feedback and closing the feedback loop? This is predominantly an informative engagement but any relevant feedback we receive from contractors will be used to ensure an effective roll-out of these new requirements.

Outcomes of engagement (notes, projects, referrals, contracts, agreements, etc.) including impacts to our customers. Number of participants in the orientation, a recorded session of the orientation for future reference

Long-term relationship potential and progress metrics used to assess relationship TBD

Engagement Title: (22) “How to Work with Energy Trust” webinar

Who are we engaging? Any firms interested in proposing to future Energy Trust solicitations with a focus on MWESB/SDVBE firms.

Who will this serve? MWESB/SDVBE firms

Timing: Q2 or Q3 based on implementation of supplier diversity tracking system

Energy Trust staff leads: Tyrone Henry

Why are we engaging? To provide an orientation to businesses that have not historically proposed to our solicitations about how to work with Energy Trust. The webinar will include information on the types of solicitations and contracts we typically release, the usual schedule of those releases and the new requirements based on our supplier diversity program. This webinar will also help to inform future networking events.

How we anticipate using the feedback and closing the feedback loop? We will be seeking feedback on other information that businesses would find helpful to better work with Energy Trust. We will also be presenting some website enhancements and getting feedback on those.

Outcomes of engagement (notes, projects, referrals, contracts, agreements, etc.) including impacts to our customers. Number of participants in the orientation, a recorded session of the orientation for future reference

Long-term relationship potential and progress metrics used to assess relationship TBD

Engagement Title: (23) Oregon Public Utility Commission DEI Measure Development

Who are we engaging? The OPUC and various environmental justice organizations that participate in the process to establish Energy Trust's 2023 DEI performance measures in accordance with HB3141.

Who will this serve? Energy Trust and environmental justice organizations

Timing: TBD based on the OPUC's schedule

Energy Trust staff leads: Tyrone Henry

Why are we engaging? HB3141 directed the OPUC to implement a process to engage environmental justice organizations in the development of a set of 2023 DEI-related performance measures for Energy Trust. Energy Trust will participate in this engagement to provide information as requested and to ensure we fully understand the expectations of this group.

How we anticipate using the feedback and closing the feedback loop? Not applicable.

Outcomes of engagement (notes, projects, referrals, contracts, agreements, etc.) including impacts to our customers. A set of 2023

DEI-related performance measures for Energy Trust.

Long-term relationship potential and progress metrics used to assess relationship TBD

Engagement Title: (24) Chambers with a focus on outreach to diverse businesses

Who are we engaging? Local Chambers of Commerce with a focus on small businesses and DEI initiatives.

Who will this serve? Small business offerings in various languages will be available to small business owners engaged with their chambers and chamber's partners like SBDC, SCORE, Small Business Administration, Small Business Legal Clinic, Business Recovery Centers, and other partner Community-Based Organizations. Beaverton Area Chamber recently shared annual reporting for small businesses served in 2021 reflect over 70% minority-owned business owners of total served through their program, Impact Beaverton, and other DEI initiatives minority-owned businesses. Half of the business owners receive a support request information for resources and education in Spanish.

Timing: Beginning January 2022

Energy Trust staff leads: Emma Clark, Mia Deonate, and CCS Outreach team

Why are we engaging? This opportunity provides many ways to strengthen our partner relationship and engage with small to medium-sized businesses through DEI initiatives in part funded by the local government. In response to the pandemic, local chambers have been a key resource for small businesses by providing technical assistance and information on various languages, education, personal protection equipment, and professional services like legal and accounting.

How we anticipate using the feedback and closing the feedback loop? Through these engagements, chambers have implemented strategies to reach communities of color and shared data and information with other entities. We see an opportunity to partner with local chambers and leverage outreach opportunities.

Outcomes of engagement (notes, projects, referrals, contracts, agreements, etc.) including impacts to our customers. TBD

Long-term relationship potential and progress metrics used to assess relationship TBD

Engagement Title: (25) DEI Plan – 2022 metrics outreach

Who are we engaging? The Diversity Advisory Council and community organizations representing communities of color, low-income communities, and rural communities

Who will this serve? Customers that have been historically underserved by Energy Trust's programs

Timing: February DAC meeting and Q2 and Q3 for at least four more engagements with organizations serving communities of color and rural communities

Energy Trust staff leads: DEI Committee

Why are we engaging? Energy Trust's DEI Plan – 2022 proposes a set of metrics for this year. These engagements will be designed to get specific feedback on those metrics including whether they are meaningful to our stakeholders and customers, whether they are sufficient indicators of success and whether they reflect adequate progress in 2022 towards the goals and outcomes. These engagements on the DEI Plan metrics are anticipated to be an OPUC Performance Metric for Energy Trust in 2022 to hold us accountable to engaging DAC and community organizations representing communities of color, low-income communities, and rural communities on our proposed metrics.

How we anticipate using the feedback and closing the feedback loop? We will track on all feedback received from these engagements and summarize how it is reflected in our revised metrics. Participants will be notified of any changes to these metrics and how their input was considered in those revisions.

Outcomes of engagement (notes, projects, referrals, contracts, agreements, etc.) including impacts to our customers. Number of participants at the engagement events. Final set of 2022 metrics.

Long-term relationship potential and progress metrics used to assess relationship TBD

Engagement Title: (26) Rural leaders attending rural focused events

Who are we engaging? Rural Leaders

Who will this serve? Customers living in rural areas.

Timing: Through rural-specific events such as – Regards to Rural (May), Making Energy Work for Rural Oregon (September)

Energy Trust staff leads: Karen Chase and Caryn Appler

Why are we engaging? Major events that convene multiple rural communities on issues that align with energy and resiliency. We have opportunity to network with attendees, share the agenda and host sessions to understand more deeply rural customer needs and how our programs and services can meet their unique needs. Also, we receive a clearer picture of rural capacity that can directly affect energy-related programs and project successes.

How we anticipate using the feedback and closing the feedback loop? Will summarize learnings and share with program leadership

team. Will follow-up with event organizers on what we learned and how it is influencing changes in programs and services.

Outcomes of engagement (notes, projects, referrals, contracts, agreements, etc.) including impacts to our customers. Undetermined at this time. Depends on what is learned.

Long-term relationship potential and progress metrics used to assess relationship TBD

Engagement Title: (27) Rural Communities

Who are we engaging? Rural Communities

Who will this serve? Customers living in rural areas.

Timing: Through regular convening of and interactions with rural stakeholders across Energy Trust service area throughout the year (such as Long-Term Recovery Groups, Latinx Interagency Network Committees, Coos County building trades workforce committee, Eastern Oregon Workforce Housing) and through regional and statewide events that provide direct access to rural leadership (such as AOC, League of Oregon Cities and the Eastern Oregon Economic Summit). Through rural community relationship development via outreach and program delivery processes (such as rural small business commercial lighting direct installation, and multifamily ductless heat pump programs).

Energy Trust staff leads: Karen Chase and Caryn Appler

Why are we engaging? To better understand rural needs, and their barriers to participating in our programs and services. To gather information on gaps in local contractors and workers. To better align offerings with rural priorities and recognize benefits in integrating and collaborating with rural issue-resolving efforts.

How we anticipate using the feedback and closing the feedback loop? Will summarize learnings and share with program leadership team and suggest an empathy mapping process. Will follow-up with community members on what we heard and how it is influencing changes in programs and services. Will obtain ongoing rural community intelligence regarding community capacity, pertinent local/regional CBOs and their focus areas, and additional and/or deeper partnership opportunities.

Outcomes of engagement (notes, projects, referrals, contracts, agreements, etc.) including impacts to our customers. Undetermined at this time. Depends on what is learned.

Long-term relationship potential and progress metrics used to assess relationship TBD