

## DEI Performance Measure Pre-Discussion Questions

The Oregon Public Utility Commission sets minimum performance measures for Energy Trust of Oregon every year. OPUC wishes to monitor and support Energy Trust's "Diversity, Equity, and Inclusion" activities and would like to expand the performance measures for Energy Trust to include these aspects.

As part of the ongoing development of a DEI performance measure, OPUC requests information to help center the conversation. A high level summary of responses will be provided to everyone, including Energy Trust. We deeply appreciate your contributions and welcome any thoughts you might be willing to share, whether they are extensive ideas or short responses.

**Please respond by noon Monday June 17<sup>th</sup> 2019.** This will give us sufficient time to prepare for the workshop on June 19<sup>th</sup>.

Name:

Organization(s) you are representing:

- 1) Energy Trust is working to improve the delivery of energy efficiency and renewables to all ratepayers, and are specifically focusing on improving program participation across diversity in customer race, income level, and geography. If Energy Trust were successful, what will success look like?
  
- 2) OPUC is considering different options to help provide the right information to the Commissioners. Ideas that we have come up with are:
  - a) A single performance measure with the aid of the DEI stakeholders
  - b) A panel of different measures based on goals Energy Trust has defined (see Attachment A)
  - c) A series of DEI performance measures that complement OPUC's existing performance measures (see Attachment B)
  - d) Other suggestion on how to approach a performance measure

Which of these approaches appeal to you?

Which is your favorite, and why?

- 3) Energy Trust has developed a number of goals to support its DEI initiative. Do you believe any of these specific goals could serve as performance measures for the OPUC? Which one(s)? See below.

- 4) While OPUC wishes to achieve increased diversity in customer race, income level, and geography, we understand that the way that Energy Trust conducts its operations and outreach is important in achieving those results. Is it more important at this point to track Energy Trust's increased participation of customers identified as underserved, or to track effective changes in operations and outreach? We'd like to understand more about your thoughts and rationale.
  
- 5) In the last meeting, we discussed whether it made sense to focus on the "baseline" of current service across priority communities, or whether we should "start from zero" and simply measure Energy Trust's progress going forward without comparing it to the past. How well does each approach resonate with you?
  
- 6) 7) Do you have a proposed approach to designing PUC DEI performance measures for Energy Trust that you would like to share?

## Attachment A: Energy Trust DEI Goals 2019-2020

1. Increase customer participation in energy efficiency programs for all underserved populations by 20 percent by the end of 2020.
  - 1A: Increase residential participation rate by 20 percent in communities of color by the end of 2020.
  - 1B: Increase participation in Existing Buildings program for small and medium business customers and business customers in rural areas by 20 percent by the end of 2020
  - 1C: Increase customer participation in Production Efficiency for small and medium businesses in rural territories by 20 percent by the end of 2020.
2. Increase customer participation in renewable energy programs for all underserved populations by 20 percent by the end of 2020.
  - 2A: Increase solar projects in low-income, rural and racially diverse communities by 20 percent by the end of 2020
3. Increase participation in the Trade Ally Network by minority- and women-owned business by 50 percent each by the end of 2020.
4. Increase the number of projects completed by minority- and women-owned trade allies by 15 percent by the end of 2020.
5. Increase the number of contracts executed with minority- and women-owned businesses by 15 percent by the end of 2020.
6. Increase overall market awareness and understanding of underserved populations through the engagement and deepening of relationships with 50 culturally specific/culturally responsive organizations (such as community-based organizations, municipal agencies, membership organizations) by the end of 2020.
7. Increase the diversity in recruitment and hiring of employees by 25 percent by the end of 2020.
8. Develop systems and support needed to collect, track, analyze and report demographic information related to program participation, program delivery and trade ally network members by the end of 2018.
9. Based on the Intercultural Effectiveness Scale survey, increase cultural responsiveness of all staff and board of directors by 20 percent by the end of 2020.
10. Increase transparency and community engagement by publishing the Diversity, Equity and Inclusion Operations Plan and progress toward its goals.

**Attachment B: OPUC's Energy Trust performance measures for 2019**

<b>Category</b>	<b>2019 Performance Measure</b>
Electric Energy Efficiency	<p>Annual utility savings and levelized cost measure:</p> <ul style="list-style-type: none"> <li>• PGE: Obtain at least 28.5 aMW; Levelized cost not to exceed 3.5 cents/kWh</li> <li>• Pacific Power: Obtain at least 16.8 aMW; Levelized cost not to exceed 3.7 cents/kWh</li> </ul>
Natural Gas Energy Efficiency	<p>Annual utility savings and levelized cost measure:</p> <ul style="list-style-type: none"> <li>• NW Natural: Obtain at least 4.4 million annual therm savings; Levelized cost not to exceed 44 cents/therm</li> <li>• Cascade Natural Gas: Obtain at least 0.43 million annual therm savings; Levelized cost not to exceed 48 cents/therm</li> <li>• Avista: Obtain at least 0.30 million annual therm savings; Levelized cost not to exceed 43 cents/therm</li> </ul>
Renewable Energy	<ul style="list-style-type: none"> <li>• For project and market development assistance (part 1), deploy at least \$1.63 million in non-solar project development assistance incentives. Maintain a non-solar project development assistance pipeline in excess of 25 projects. Report number of projects served total dollars spent, and summarize project progress through development stages.</li> <li>• For project and market development assistance (part 2), report annual results, including number of projects supported, milestones met and documentation of results from market and technology perspective.</li> <li>• Obtain at least 1.7 aMW of installed generation of standard net-metered Solar program projects.</li> <li>• For solar projects funded outside of the Solar program's standard, net-metered incentive offer, report sources of funding for projects and the criteria for selection.</li> </ul>
Financial Integrity	<ul style="list-style-type: none"> <li>• Unmodified financial opinion</li> </ul>
Program Delivery Efficiency	<ul style="list-style-type: none"> <li>• Administrative and program support costs must be below 8% of annual revenues</li> <li>• Administrative and program support cost growth is limited to 10% year-over-year increase.</li> </ul>
Staffing	<ul style="list-style-type: none"> <li>• Total staffing expenditures will not exceed 7.25% of total organization expenditures calculated on a 3 year rolling average for public purpose funded activities in Oregon</li> </ul>
Customer Satisfaction	<p>Greater than 85% satisfaction rates for:</p> <ul style="list-style-type: none"> <li>• Interaction with program representatives</li> <li>• Overall satisfaction</li> </ul>
Benefit/Cost Ratios	<ul style="list-style-type: none"> <li>• Report both utility system and societal perspective annually</li> <li>• Report significant mid-year changes as warranted in quarterly reports</li> </ul>
NEEA and Market Transformation	<p>Report annually:</p> <ul style="list-style-type: none"> <li>• Savings and costs</li> <li>• Savings strategies</li> <li>• Show Energy Trust direction to NEEA through committee membership</li> <li>• Summary of Energy Trust direction to NEEA</li> <li>• Summary of NEEA initiatives Energy Trust opts out of and why</li> </ul>