

# **Investing in Relationships**

Strategies for State Agencies to Equitably Partner with Communities

**By Bayoán Ware and Lidia Garcia** Energy Trust of Oregon







#### **About this Report**

This case study was developed as part of the Clean Energy States Alliance's (CESA) Solar with Justice: Connecting States and Communities project. The Solar with Justice project aims to bring together state energy agencies (SEAs) and community-based organizations (CBOs) developing solar for environmental justice (EJ) communities to create opportunities for dialogue and collaboration. This case study is the first of six case studies that will be published by CESA under the Solar with Justice project, highlighting models of collaboration between CBOs and SEAs on solar for environmental justice communities. Bayoán Ware and Lidia Garcia of the Energy Trust of Oregon produced this case study based on interviews with Energy Trust staff and community partners.

#### **Land Acknowledgement**

In the spirit of reconciliation, this case study was developed and written on the traditional lands of the Kalapuya, Multnomah, Molalla, Cowlitz and Tualatin peoples.



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#### DISCLAIMER

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### **Contents**

- Introduction
- **Background**
- **Diversity Advisory Council**
- 10 Diversity, Equity, and Inclusion **Committee Community Engagement Sessions**
- 12 Community Partner Funding
- 14 Working Together Grants
- 16 Solar Ambassadors
- 19 Community-Based **Liaison Network**
- 21 Conclusion

### Introduction

nergy Trust of Oregon, Inc. works with community representatives, specifically small businesses, community-based organizations (CBOs) and individuals, to achieve shared goals through different forms of engagement. This case study analyzes the engagement activities in the list below to highlight practices that state agencies can use to build relationships with community representatives:

- Diversity Advisory Council
- Community Partner Funding Program
- Working Together Grant Program
- Community Based Liaison Network
- Solar Ambassador Pilot Project
- Diversity Equity and Inclusion Plan Engagements

Each of these engagements has yielded lessons and practices that advance Energy Trust's relationships with community development. Notably, each also involves some form of



The ideal of fairness demands compensation; however, providing resources in exchange for labor can sometimes create a simple transactional relationship. Without taking additional steps to ensure equity and foster collaboration, this can lower the ceiling on what is possible by working together.

compensation for the community representatives. The ideal of fairness demands compensation; however, providing resources in exchange for labor can sometimes create a simple transactional relationship. Without taking additional steps to ensure equity and foster collaboration, this can lower the ceiling on what is possible by working together. Energy Trust views compensation as a component of achieving valuable collaboration; it is one of many necessary ingredients in the recipe for making healthy relationships with community representatives. While it is a part of each activity in this case study, it is simply one element that serves the greater purpose: collaboration.

### Background

nergy Trust of Oregon is an independent nonprofit organization committed to helping Oregon and Southwest Washington's private utility customers and communities reduce costs and realize additional benefits of energy efficiency and renewable energy, including improving resiliency and electric grid reliability. It does this through the use of funds from a public purpose charge of all private utility customers. These funds are given by the Oregon Public Utility Commission (OPUC) through a grant agreement. Since 2002, it has helped customers transform more than 789,000 homes and businesses with clean energy improvements. These efforts are contributing to \$9.7 billion saved on utility bills over the lifespan of the improvements, \$10.4 billion in cumulative benefits to date added to the economy and 22.3 million tons of carbon dioxide avoided in past and future savings over the last 21 years. Although it is not a state agency itself, Energy Trust's lessons can be applied by similar programs in other states that may be within state agencies or supported by them.



For most of its history, Energy Trust focused on acquiring the most energy savings and renewable energy generation through the most cost-effective means. To do so, it developed programs that required the least investment from the organization to get the maximum results, and it consistently met energy savings and generation performance measures set by the OPUC. However, despite receiving funds from a diverse set of customers throughout the state, Energy Trust mostly served White, wealthy homeowners and businesses in the Portland metro area because they required the smallest cash incentives and least program support to participate. As a result, it underserved Black and Indigenous people, other communities of color, households experiencing low incomes, and rural communities. In fact, this imbalance continues today, as the most recent Customer Awareness and Participation

Study revealed that Hispanic/Latino (12%) and Native American/Indigenous (12%) households participate at lower rates than Asian/Pacific Islander (25%), Black/African American (24%), and White (19%) households. Additionally, homeowners (22%) participate in programs much more than renters (13%).

In 2014, Energy Trust conducted a study to compare the current and potential participation rates of households in the Portland Metro Area and the non-metro area, uncovering an underserved demographic: Hispanic households. As the organization's understanding of its customer As the organization's understanding of its customer base grew, it continued to realize the degree to which it was falling short of its mission to serve all eligible customers, including other underserved demographics.

base grew, it continued to realize the degree to which it was falling short of its mission to serve all eligible customers, including other underserved demographics. Corrective actions were incorporated into Energy Trust's five-year strategic plans, annual budget, and action plans. These included streamlining programs to help small businesses participate more easily, increasing cash incentives for income-qualified customers, and hiring dedicated outreach staff to serve Eastern and Southern Oregon.

In recent years, the organization launched a Diversity, Equity, and Inclusion (DEI) initiative to investigate areas for further improvement. This led to the development of strategies to improve operations and program processes, participation in internships and fellowships aimed at priority populations, and the creation of a DEI Committee and a DEI Plan. The results of these efforts are seen in each example in this case study.

### **Diversity Advisory Council**

nergy Trust's Diversity Advisory Council (DAC) is made up of external stakeholders who represent or serve communities within Energy Trust's service territory that it was underserving: Black, Indigenous and people of color (BIPOC), households experiencing low incomes, and rural communities. It supports the organization's DEI goals by providing input and feedback on the development of organizational documents and data analysis; identifying opportunities and topics for the board and leadership to discuss; and providing Energy Trust with community insights and informing their communities about Energy Trust.

Truly effective projects involve co-creation with the community in the earliest stages. Energy Trust staff spent a year conducting outreach to community leaders around the state to gather ideas for DAC's role and recruitment strategies. These activities led to the establishment of the Foundational DAC, which co-created the charter with staff and two Energy Trust board members. The group started its work together before any documents were drafted which fostered more creativity, allowing for better designed projects earlier in the process. The charter exemplifies this as it reflects input from all parties involved.



State agencies best engage with the community when staff—and ideally leadership—make embedding equity into programs a priority. Energy Trust's current executive director joined the organization in part because of the strides it had made related to equity and its desire to continue those efforts based on the premise that diversity fosters resilience and competitiveness.

The Foundational DAC sought to create a council with a diverse membership and areas of expertise that Energy Trust needed but was not already provided by the two existing advisory councils, the Conservation Advisory Council or CAC and Renewable Advisory Council or RAC. This required a more flexible and varied membership that possessed a wider range of personal and professional experiences than those of CAC and RAC. CAC and RAC members have typically been individuals in the energy field whose time on the councils is compensated by their employers. The Foundational DAC researched various methods of reducing barriers to participation, such as meeting outside of traditional work hours, providing food and childcare, and offering stipends. Stipends proved the best solution, because offering stipends carried the lowest legal liability due to standardized implementation, while others, such as the provision of childcare, required additional insurance protections.

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### Diversity, Equity, and Inclusion Committee Community Engagement Sessions

nergy Trust's Diversity, Equity, and Inclusion (DEI) Plan establishes numerous goals, outcomes and metrics to gauge success. As part of finalizing the plan, staff organized seven engagement sessions to get input on draft metrics to be used in finalizing the plan. Staff invited CBOs that serve BIPOC households and businesses, rural populations, and individuals experiencing low incomes.

This project benefited from the participation of Energy Trust's outreach staff, who serve in community-oriented roles and have personal and professional relationships cultivated over years at other organizations. Outreach staff make an organization more approachable, creating introductions that allow for future collaboration and maintaining relationships over time. In this case, staff invited their contacts to these engagement events, in addition to representatives from CBOs that Energy Trust already worked with.

Staff made participation as easy as possible by scheduling these events as working lunches in easily accessible locations. Energy Trust provided lunch, an example of non-monetary



Some state agencies work under financial restrictions that prohibit directly paying people participating in engagement activities. Alternative options for compensation include sponsoring an event a community partner group organizes, conducting marketing that highlights an organization's programs, or offering other in-kind benefits.

compensation. Staff asked clear questions and provided ample time and freedom for participants to share their thinking.

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### **Community Partner Funding**

nergy Trust provides cash incentives for energy-efficient upgrades and services for single-family homes, manufactured homes, and multifamily residences. With its Community Partner Funding Program, community-based organizations receive capacity building and administrative resources from Energy Trust to help priority populations gain access to enhanced incentives beyond the standard cash incentive amount, up to the complete cost of the equipment or service. These populations include households experiencing low-to-moderate incomes, communities of color, individuals with disabilities, service-disabled veterans, and rural households.

The key lesson that Energy Trust learned through the development of Community Partner Funding is that compensation does not automatically create an effective collaboration. Simply providing funding for the program's cash incentives, administrative costs, staffing and any form of compensation does not always lead to success. Many CBOs have limited capacity, and agencies must utilize their expertise and resources in needed areas to help them build capacity. Energy Trust does this by providing Community Partners with subject training, marketing assistance and industry relationship development and through program logistics.

Energy Trust has typically used standard professional service contracts. However, some CBOs have little experience with this type of agreement nor the logistical requirements they entail, such as invoice submittal. Energy Trust accounts for this gap by providing draft contracts and other program documentation to newly participating CBOs. Energy Trust has an onboarding process and payment structures. There is a formalized calendar during which staff establishes meetings for specific topics, such as budget recalibration, at specific times during the year to ensure all needs are met without overburdening staff.

Capacity building works both ways. Energy Trust staff began with the humble recognition that we did not have deep relationships with most of the state's diverse communities, which prevented us from meeting our goal of better serving historically underserved customers. This awareness compelled us to seek assistance from knowledgeable experts with years of experience serving these residents.

Capacity building works both ways. Energy Trust staff began with the humble recognition that we did not have deep relationships with most of the state's diverse communities, which prevented us from meeting our goal of better serving historically underserved customers. This awareness compelled us to seek assistance from knowledgeable experts with years of experience serving these residents. These subject matter experts in community-based organizations taught Energy Trust how to customize and adjust traditional program operation to suit their needs, and, by extension, the communities they serve. And because of the expected learning curve, the program focuses on desired outcomes with the understanding that success might look different, come later than expected, or not at all. Staff and the CBOs reflected this understanding in the contracts, so that CBOs would have protection against negative consequences for not meeting certain targets.

Understanding that each CBO and the communities it serves has unique opportunities, challenges, and needs, the staff and the cocreating CBOs embedded flexibility into the program. The role Energy Trust plays depends on the CBO's needs and desires. It could be guiding and educating a CBO to help it through the process, or helping the CBO realize a vision it independently imagined. In other instances, it could be simply providing financial resources and no guidance at all.

Initially, staff strove to complete simple, discreet projects based on the premise that small successes would create momentum for larger ones. As the projects developed, trust grew between the organizations, strengthening the relationships. Early partners were able to serve more clients with more Energy Trust offers; particularly ambitious partners leveraged the capacity and expertise gained by collaborating with Energy Trust to access other sources of funding. Community Partner Funding has grown thanks to these initial relationships in 2017, adding five new partners per year for a total of 20 in 2022.

Iterative and collaborative endeavors demand significant resources; state agencies must be willing to commit staff time and funds and properly set expectations as returns may look different from traditional projects. Desired results may not come in the expected time if at all. Because organizations have different starting points, and in recognition that learning and growth sometimes comes from missteps, state agencies must be willing to even allow partner organizations to fail. In addition to lessening the impact of those potential failures, starting small helps builds trust, a key ingredient to future success.

### **Working Together Grants**

orking Together Grants are a competitive grant opportunity from Energy Trust with funding of up to \$10,000 for nonprofits interested in pursuing activities that help diverse customers and communities to access clean energy. CBOs can use funds on activities or events that promote clean energy and participation in Energy Trust programs; they can also use funds to increase their capacity in ways that support participation such as staff training or consultant services.

The impetus for this project was Energy Trust's prior experiences with CBO partners. A CBO might desire to work in the energy sector and with Energy Trust specifically, but funding constraints around staffing, training, and consulting resources may have prevented it from doing so. For some organizations, the COVID-19 pandemic brought diminished capacity and heightened community needs.

As with Community Partner Funding, staff interviewed CBO partners who serve different geographic and racial and ethnic customers and communities to collect ideas that ultimately served as the foundation for the grant offer. Partners helped staff identify the purpose of the



grants, grant amounts, the application process and fund dispersal. At \$10,000, the grant's purpose is not to meet all of a CBO's capacity needs. It is a relationship development tool, creating trust and building connections to help CBOs and Energy Trust better serve their overlapping customers and communities. Stronger bonds create opportunities for future

collaboration and participation, such as through another Energy Trust program or Community Partner Funding.

When developing new projects like Working Together Grants, it is still often necessary to start small to account for unexpected needs. Energy Trust staff members started the first round understanding that the staff would make changes over time. When projects start with relatively little structure, it is easier to make improvements over time. In this case, needs fell into three categories. The first was CBO application and

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enrollment support. Some applicants did not qualify for the grant because they proposed projects for which Energy Trust had already created entire programs. In the spirit of relationship building, staff connected applicants with colleagues who managed those programs. Finding the right point of contact required significant time. This led to the second time-intensive activity: coordinating with internal staff to make these connections. Third, the first grant round experienced administrative inefficiencies. Energy Trust learned that, counterintuitively, many hands do not always make the work light. Various staff were given responsibility for different steps of the application and enrollment processes, which created confusion for the staff and the applicants. These challenges were rectified in part by clarifying eligible ideas and reducing the number of staff managing the grants.



### **Solar Ambassadors**

he Solar Ambassadors Project is a pilot to increase access and awareness of residential solar electrical systems among homeowners of color in the Portland Metro Area. The team comprises seven CBOs. Energy Trust plays a facilitation and project management role. The project is currently underway and was one of just eight selected to participate in the third round of the Solar Energy Innovation Network (SEIN) program, which is funded by the U.S. Department of Energy Solar Energy Technologies Office and led by the National Renewable Energy Laboratory. Selected project teams receive financial, analytical, and facilitation support to address new challenges and opportunities stemming from equitable solar energy adoption. The team will train and support community members recruited from the communities the CBOs serve to become "Solar Ambassadors." The solar ambassadors will, in turn, strengthen awareness and understanding of solar in their communities with community education and providing one-on-one support to homeowners interested in solar. The Solar Ambassadors are supported with a culturally responsive curriculum and solar roadmap developed by the team.



The development of trust is integral to inter-organizational relationship building. That is most effectively done through power-sharing. The two lead CBOs leveraged their relationships with other CBOs to invite them to join the project. While this process did build trust between Energy Trust and some of the CBOs with whom it had no previous relationship, the invited CBOs did not receive the same information regarding the project. This led to time unnecessarily being spent to reexplain the project to them. Instead, state agencies should request the connecting entity to make an introduction. The co-leads prioritized consensus decision-making and entrusted the staff with a significant leadership project

management role. This was possible because of the personal relationships individuals at all of the organizations involved have with each other. Even if the organizations themselves had little professional experience together, the individuals based their participation on personal connection and trust.

Although collaborations like this one are often thought to be between organizations, it is more accurate to view them as to be between the individuals within each organization. The trust that relationships require develops over time. The co-leaders for this pilot had also co-created Community Partner Funding four years prior. Starting with small, low-risk ventures which allow individuals and organizations to

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learn about each other helps to build trust and assess the viability for deeper connection. It helps to take the perspective of a gardener: plant seeds with the understanding that not every one needs to flourish.

As also seen with the development of the Community Partner Funding Program, CBOs needed capacity building for the Solar Ambassadors Pilot. Team education played a significant role in the project, as the representatives needed to understand the topic well before developing pilot materials. Energy Trust expected this, as capacity building was one of the reasons for inviting some of the organizations. This highlights the need for resources designated for preparatory activities to be included in project scopes.

Capacity is a consistent concern for many CBOs, which often rely on grants, a relatively unstable funding source, to finance operations and programs. As the staff sizes of the partner CBOs on the team range from one to nearly 50, Energy Trust began the project understanding that resources would need to be managed equitably, rather than equally. For the pilot, it has meant that the staff resources Energy Trust devotes to the project surpass those of all the other partner organizations combined. Despite this, virtually all the funds originally designated for staff are redirected to project needs. This is financially feasible for the organization because it reserved additional funds in its department budget for this project. This is an equitable decision because Energy Trust's staff capacity and annual budget are larger by multiple factors than all the CBOs, so it can afford to share more of its resources to add to the collective capacity.

The beginning of this project was marked with flexibility. The murder of George Floyd in May 2020 led to personal and collective reflection among staff, which drove the desire to develop programs that focused on serving the Black community. At the time, Energy Trust did not have a structure in place for innovative programming. As a result, the Renewables Department created a service called Idea Lab, which provided support for ideation. The need for flexibility has proven integral throughout the Solar Ambassadors pilot's development, especially regarding decision-making. While Energy Trust is ultimately responsible for the project's outcome, it is intentionally sharing power with the team, which is a departure from standard program development procedure. Co-creation is at times inefficient, sometimes requiring lengthy dialogue before decisions are made. State agencies must acknowledge the power dynamics inherent in working with CBOs and consistently work to share some of their authority. This requires flexibility and a continual willingness to adapt. For the pilot, this meant that staff played a project management and facilitation role and followed the group's direction even if it did not necessarily agree with the decision.

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Flexibility also entails preparing for the unexpected. Participation of the partner organizations highlighted new needs, such as the creation of a technical team to be available to answer financing, tax, and solar electrical technology questions. This also demonstrates the need for the early involvement of external partners, as outside perspectives strengthen the final idea. Despite the understanding that the pilot would cater to Spanishas well as English-speakers, staff incorrectly assumed that the CBO representatives would all speak English. Although Energy Trust already had interpretation and translation services, staff had neglected to budget sufficiently to meet the need. The Energy Trust team will not repeat this misstep, but it is not possible to

prepare for every detail, especially when engaging in new activities; therefore, project budgets should include funds for unexpected expenses.

CBO capacity constraints remain a pervasive challenge for the project. Even before the official project kicked off, staffing shortages forced one organization to discontinue its participation. At another organization, the staff position which included representation on the Solar Ambassadors pilot project team has been vacated twice. During these disruptions, it is critical that Energy Trust pivot and expand its responsibilities to ensure all roles are filled.

# Community-Based Liaison Network

The Community-Based Liaisons (CBL) are a network of professionals in energy-related and non-energy related fields from communities that Energy Trust has historically underserved who support the Existing Buildings Program, an Energy Trust-administered incentive program incentivizing energy efficiency upgrades, reach undeserved customers and support the Program's effort to become more equitable. The liaisons do this by offering feedback and insight during initial stages of offer development, providing guidance on effective outreach, and fostering healthy relationships with these communities by engaging with them.

As seen with the Solar Ambassadors, collaborations thrive when individuals trust each other. This is particularly important in contractual relationships in which the state agency pays a community-representing entity for services and can choose to terminate the contract at its will. Energy Trust builds trust with the CBL Network by willingly engaging in open discussion regarding topics of potential disagreement and working to come to an agreement.



The liaisons expressed frustration with institutions using the ideas and products that the BIPOC community developed without proper attribution; therefore, staff makes written and verbal recognition of the liaison's contributions and co-presents their work to the organization. Recognition helps to balance the inherently uneven power dynamic by having members speak for themselves rather than having someone else speak for them.

Regardless of the degree of power-sharing, all contracts have an end date, and it is incumbent upon all parties, but especially the state agency, to build trust and strong lines of transparent communication. This keeps community members generally well-informed, aware of upcoming changes and, consequently, able to prepare for them. It also provides an avenue for the state agency to learn ways to improve to meet the needs of the liaisons.

Although collaboration with community may take the form of a client-contractor relationship, healthy dynamics often align more closely with a collaboration where both parties exercise flexibility. As agencies have more resources, they should take more responsibility to meet

the needs of the community partner. This may mean creating flexibility around deliverable deadlines, meeting schedules, and generally working at the pace of trust, rather than a preset timeline.

When creating anything new, and especially when working with new partners, agencies should expect some conflict. Rather than a sign of incompatibility, conflict should be used as a means of relationship development. Staff and partners often enter a project unknowing that there are different expectations and with roles and responsibilities very much in formation.

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This occurred between staff and the CBL network regarding the appropriate time to solicit feedback on program development, as staff included the liaisons after the ideas were well formulated. This caused issues as neither party's needs were being met. However, instead of allowing those difficulties to end the relationship, both parties agreed to find a solution: including the liaisons sooner in the process so they might create with staff instead of simply providing feedback on programs already well into development. Rather than sever trust, working through friction builds trust if all parties are willing to be flexible in the process and committed to the purpose of the collaboration itself.



State agencies generally experience a degree of separation between themselves and the communities they serve; therefore, it is essential that they partner with community representatives deeply and often. This is the best way that they can realize their missions of service. Energy Trust's activities highlight five steps to do this:

- 1. **Identify the problem** Staff may independently discover areas of need without any assistance; however, including community representatives in this initial stage clarifies the needs and challenges. Community representatives should be compensated for their expertise, ideally financially. The development of Community Partner Funding and the Solar Ambassadors project both exemplify this. Although staff understood that there were gaps in service provision, they worked with CBOs to better understand those gaps.
- 2. **Conduct preliminary research** Some state agencies may have already developed solutions that they would be willing to share with their colleagues at other agencies. They should be contacted for initial guidance. Energy Trust staff received assistance



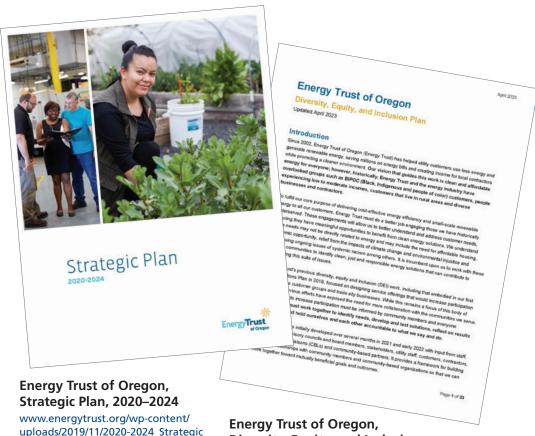
from the Portland Clean Energy Fund before establishing the Working Together Grants. When putting together the Diversity Advisory Council (DAC), Energy Trust researched compensation levels among state agencies for similar community stakeholder or advisory groups. Community representatives, like some of the members of the Foundational DAC, can play an integral role in understanding how recommendations apply to their local contexts.

- 3. **Brainstorm small solutions** Agencies and community representatives should co-create small solutions that can be effectively managed and adjusted by both staff and the representatives. For example, while each Working Together Grant has a specific purpose, its goal is to enact a small remedy for an issue and develop a relationship that provides a foundation of success and trust to build upon for greater solutions in the future.
- 4. **Conduct a pilot** Community representatives should not only co-create the solutions but also collaboratively carry them out. For this to occur, agencies should provide them with the resources for staffing and general capacity building needed to execute the solution. Dialogue is key in every stage but especially this one, as longer-term contracts are often signed at this time. In the Solar Ambassadors Project, while Energy Trust and the CBO team understood that communities of color faced multiple barriers to solar adoption, they only focused on one barrier lack of access to education. This pilot is an opportunity to strengthen relationships, increase collective knowledge of the challenges, gain insight into potential solutions, and begin to develop a track record of successful collaboration. Similarly, Community Partner Funding established discreet goals with the initial participants, using those experiences to improve the program over time.
- 5. **Assess and iterate** All parties should expect unforeseen challenges, as are inevitable with any new project. They should periodically assess the project and use this process to determine where resources are most needed to move to the next phase. For example, Working Together Grants conducts a review after every grant cycle. Solar Ambassadors has a clear end date, after which the team will gather and analyze feedback before planning the next steps.

The activities described in this case study share the same principles and, in most cases, followed a variation of the above development pattern. But there is always room for improvement, and, as challenges evolve, so must their solutions. Even as state agencies partner with communities to overcome specific difficulties, they should view every interaction as an opportunity to grow a relationship and support community partners. As state agencies and community partners increase their webs of interconnection and collaboration, they will all be able to better meet their shared goals.

### INFORMATIONAL RESOURCES FROM THE

# **Energy Trust of Oregon**



uploads/2019/11/2020-2024\_Strategic PlanGuide\_Final.pdf

Diversity, Equity, and Inclusion Plan, June 2022

www.energytrust.org/wp-content/ uploads/2022/07/2022-DEI-Plan.pdf



The Clean Energy States Alliance (CESA) is a national, nonprofit coalition of public agencies and organizations working together to advance clean energy. CESA members—mostly state agencies—include many of the most innovative, successful, and influential public funders of clean energy initiatives in the country.



CESA works with state leaders, federal agencies, and other stakeholders to develop and promote clean energy programs and markets, with an emphasis on renewable energy, energy equity, financing strategies, and economic development. CESA facilitates information sharing, provides technical assistance, coordinates multi-state collaborative projects, and communicates the views and achievements of its members.

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50 State Street, Suite 1, Montpelier, VT 05602 802.223.2554 | cesa@cleanegroup.org | www.cesa.org













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