

Empowering Energy Equity in Rural, Low-Income Communities

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ABSTRACT

Utility customers who pay into ratepayer-funded programs intended to provide support for energy efficiency improvements and clean energy generation ought to equitably benefit from those programs. Equitable access to and participation in inclusive clean energy programming across all communities and geographies is essential for individual and community resiliency and aspirations for a sustainable future.

Investor-owned utility customers in rural Oregon qualify to utilize and benefit from Energy Trust of Oregon’s incentives and technical services, but they have not had equitable access to Energy Trust’s programming, and rural program participation lags that of urban and metro areas. This lack of rural participation stems in part from Energy Trust’s Portland location base and historic orientation and its sparse and inconsistent rural Oregon presence in the past. The urban-rural divide in Oregon is nuanced, and gaining understanding about rural conditions and people prepares energy services organizations to hone and tailor outreach, improve equitable service delivery, and maximize their work with rural communities.

Energy Trust now works directly with rural community-based organizations. This paper introduces three of these organizations and the environments in which they operate and describes components of mutually beneficial partnerships for program delivery to rural communities. It includes perspectives on how energy efficiency programs offered at the community level can contribute to improved well-being of historically under-resourced and overlooked communities and rural residents. And it points out how this work might help to influence a more decentralized distribution of energy related resources and decision-making authority.

Introduction

Amann, Tolentino, and York (2023) described how energy efficiency programs have not served all utility customers equitably, in *Toward More Equitable Energy Efficiency Programs for Underserved Households*. These authors point out that both untargeted programs and programs directed specifically to income-qualified households have been ineffective in addressing the needs of underserved communities. They state, “Equity requires the design and delivery of programs that meet the needs of underserved communities, such as low-income and communities of color. Achieving greater equity in programs can ensure that all types of customers can benefit

from the clean energy transformation and reap the multiple benefits of increased energy efficiency” (Amann, Tolentino, and York 2023, 6).

In their DOE-SEP funded four-state research, Winner, MacDonald, Smith, and Juillerat overlaid income and rural communities and found energy burden to be “33% higher in rural areas and that participation in residential energy efficiency financing and rebate programs can be significantly lower. The combination of higher energy burdens and greater barriers to participation can lead to inequitable distribution of available resources for energy efficiency, meaning that those who could benefit most from efficiency upgrades are often least able to access them” (Winner, MacDonald, Smith, and Juillerat 2018, 4).

To expand customer access to services, outreach staff at Energy Trust of Oregon have developed and maintained long-term relationships spanning over a decade with community-based nonprofit organizations across its service areas. Energy Trust has increasingly engaged rural organizations for customer outreach and program delivery. Three of these community-based organizations (CBOs) – Illinois Valley Community Development Organization (IVCDO), Klamath Lake Community Action Services (KLCAS), and Lake County Resources Initiative (LCRI) – serve rural communities and households with low incomes, as well as differing proportions of Black, Indigenous, and people of color within their communities.

The focus of this paper is the expansion of participation and access for rural, low-income customers. Readers will learn how Energy Trust and these CBOs have developed customized solutions that deliver participation levels not achieved through untargeted and traditional approaches. Ultimately, equitable, shared ownership of energy programs, implementation and policy by rural communities and their CBOs can achieve energy savings while simultaneously benefiting the CBO and community in additional ways.

Josephine, Klamath and Lake Counties of Southern Oregon - Overview

The following is a snapshot of the demographic characteristics of these three rural communities to provide a deeper understanding of the communities served by Energy Trust, IVCDO (Josephine County), KLCAS (Klamath and Lake Counties), and LCRI (Lake County). Understanding demographic characteristics is foundational for developing solid program design and delivery. In summary, from U.S. Census Bureau QuickFacts, 2023, Josephine, Klamath and Lake counties all have populations that are older, more disabled, less educated, and with higher unemployment and poverty levels, and lower incomes when compared to Oregon as a whole.

Age. These counties have a higher percentage of older residents than Oregon overall, with 27.3% of Josephine County and nearly as many Lake County residents older than 65, and Klamath County not far behind. Oregon’s overall senior population is less than 20%.

Race and ethnicity. Rural Oregon, including these three counties, has more white residents than the state overall. Still, as part of the traditional lands of the Klamath, Modoc and Yahooskin peoples (now Klamath Tribes), 5% of Klamath County is counted as American Indian or Alaska Native, compared to 1.1% statewide. There is also has a relatively large Hispanic and Latino

population at 14.9% in Klamath County, a slightly higher percentage than that of the state (Homefacts, “Oregon Demographic Data.”; Census Bureau, Quick Facts, Oregon 2020).

Age and condition of homes. Rural Oregon residential structures are older and by many accounts, more dilapidated, and conceivably more costly to operate than in urban and metro areas. As an example, pre-1980 manufactured homes are thought to use up to 50% more BTUs per square foot than other types of homes (Templeton, 2013). More than 41% of Oregon’s manufactured housing stock was built before 1980 (Prosperity Now, 2012). Rural Oregon has relatively more manufactured home stock. By 2004, 32% of housing units in the Illinois Valley were manufactured, compared to 10% in Oregon (Community Planning Workshop, 2004).

Income and Poverty. Median household income (2018-2022) for Oregon was \$76,632, while median household incomes for Josephine, Klamath, and Lake counties were among Oregon’s lowest at \$56,068, \$57,217 and \$54,663, respectively. These counties also experience some of the state’s highest poverty levels. U.S. Census 2023 report placed Josephine County’s 18% poverty levels at almost one-and-a-half times that of the state’s figure (12.1%), while Klamath County’s poverty level was at 15.5% and Lake County was at 16.5%.

Relationship and Partnership Development - Energy Trust of Oregon and Three Rural CBOs Learning Together

Energy Trust of Oregon – Energy Services Delivery

Energy Trust of Oregon is a non-governmental, independent, nonprofit organization created to administer investor-owned utility (IOU) ratepayer funds under a grant agreement with the Oregon Public Utilities Commission and deliver IOU customer energy savings and generation. Energy Trust provides energy efficiency and renewable generation cash incentives and technical assistance to the customers of five IOUs in Oregon, including Portland General Electric, Pacific Power, NW Natural, Cascade Natural Gas and Avista, and NW Natural in SW Washington. In Oregon, these IOU utilities cover 74% of all utility customers. The IOUs serve the major population centers in the state, and a substantial portion of the rural areas as well, so Energy Trust has customers in 32 of 36 counties across Oregon. See Figure 1.

Pacific Power is the IOU electric provider to customers throughout much of southern Oregon. Other parts of southern Oregon region are served by several consumer-owned electric utilities, utilities owned by the public or specific communities. Avista provides natural gas service to most of those communities in southern Oregon that have natural gas available to them, while NW Natural provides natural gas to Coos Bay on the south coast.

Energy Trust’s energy efficiency programming is supported through contracted program delivery implementers and direct staff. This includes larger contracts with national companies and smaller firms, many engaged through supplier diversity requirements. These program implementers place staff across the service area. Energy Trust also recognized that having a

direct employee presence in rural service territories would increase program participation rates. In 2014, Energy Trust embedded two outreach staff in regions outside the Portland metro area, in rural southern and northeastern Oregon.

In the years that followed these two hires, Energy Trust leadership began to work toward diversity, equity and inclusion (DEI) objectives to equitably serve all IOU customers, with a focus on rural communities, customers with low-incomes, and Black, Indigenous and people of color. Since then, Energy Trust has created DEI plans, with broad input, to achieve DEI goals. Energy Trust is not alone in advancing this approach.

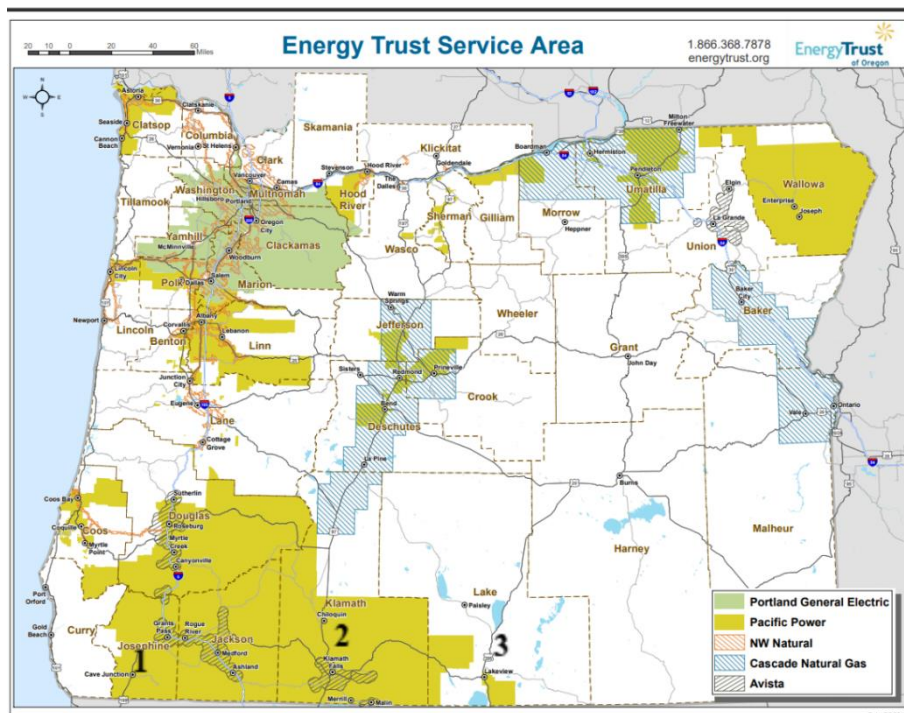


Figure 1. Energy Trust of Oregon service territory. 1. Cave Junction and Josephine County. 2. Klamath Falls and Klamath County. 3. Lakeview and Lake County. Source: Energy Trust of Oregon 2024.

Illinois Valley Community Development Organization – Emerging Community-based Program Delivery

IVCDO was established as a nonprofit in 1995 as the Illinois Valley Community Response Team (IVCRT) by a small group of local, resourceful rural residents. They were initially funded by USDA as one of 36 original Rural Empowerment Zone/Enterprise Communities nationwide. The Congress-authorized funding was intended to help revitalize economically distressed communities, as the Illinois Valley was designated due to the collapse of the timber industry and decades of disinvestment.

IVCDO is the only community services organization of its kind in Josephine County. Based in Cave Junction (with a population of about 2,000), IVCDO regularly serves the Illinois Valley, with a population of about 18,000, and often serves all of Josephine County. It also provides capacity for the tiny government of Cave Junction, which has an unpaid mayor and no city manager. The Illinois Valley, including Cave Junction, is served by Pacific Power for electricity, and has no natural gas service. Some homes and commercial buildings use bulk fuels for heating, including propane and oil. Wood is also commonly used as a primary or secondary heat source. A handful of homes and at least one Cave Junction business have installed grid-tied solar arrays. Some residences are off grid, using solar energy and occasionally, small hydropower, some systems with supplemental batteries.

The Energy Trust regional outreach manager had a long-established and trusting relationship with IVCDO, including formerly serving on the IVCDO board and IVCDO commercial loan advisory committee. As part of their community resource services, IVCDO stocked Energy Trust collateral in their office for several years. IVCDO began officially working with Energy Trust in early 2022, and this was their first foray into energy-related work.

Commercial No-Cost Lighting Offer – Energy Trust and IVCDO Collaboration. When Energy Trust created a no-cost small commercial lighting LED upgrade offer in 2022, Energy Trust’s regional outreach manager approached IVCDO with a proposal to create a strategy to ensure small, low-income businesses in Cave Junction and surrounding Illinois Valley could benefit from this offer. At the time, the energy industry had expressed that opportunities for LED lighting upgrades and resulting savings were close to exhausted. So, the results from this low-income, rural community effort surprised many.

A collaboration created between Energy Trust, IVCDO, the City of Cave Junction, and the local Chamber produced promotional materials that IVCDO staff handed out in person to Cave Junction and Illinois Valley businesses, nonprofits including the food bank, churches, small manufacturers, and other potential lighting customers. IVCDO staff discussed eligibility with the businesses and organizations (Energy Trust of Oregon, “No-cost Lighting Upgrades for Small Businesses”). IVCDO staff scheduled Energy Trust staff site visits and joined them onsite, ensuring personal introductions to the building or business owner. Energy Trust staff lined up lighting installers who completed the projects.

Of 48 buildings and businesses visited through this project, 44 had not upgraded their lighting to LED. Some were still using incandescent bulbs, many had T-12 fixtures, and complaints of inadequate lighting were common. This effort provided clear evidence that rural, low-income towns’ commercial buildings still have ample opportunity remaining for lighting upgrades and resulting energy savings.

IVCDO’s success in this initial program has led to a series of additional opportunities to serve their community members with energy programming, including ongoing work with Energy Trust’s residential program, and Oregon Department of Energy’s heat pump program. The following are key findings from the initial commercial lighting project with IVCDO. These findings informed future similar community efforts:

Awareness and Messaging. This community-led approach was extraordinarily effective, whereas prior standard marketing yielded little participation.

- Building and business owners were largely unfamiliar with Energy Trust. This effort created greater awareness of the organization by delivering the message in person.
- Overall, participants recognized the usefulness of saving money on electric bills.
- Business and building owners, generally lacking knowledge about energy efficiency and components of their buildings, appreciated the expertise of Energy Trust staff on site.

Efficiency. This approach was immensely time- and cost-efficient and served far more customers. Site visits were grouped into three full days, minimizing travel and using in-community time effectively. In traditional non-targeted offers, site visits are scheduled according to customer requests, rather than concentrated over several days.

Trust. Most customers were unfamiliar with Energy Trust and its work. During the initial site visits, some businesses and building owners expressed that they would not have been interested or eager to participate in the no cost lighting offer had it been presented by an Energy Trust staff person who they did not know, even if in person. Comments shared included:

- Businesses would have been unlikely to trust the person or the offer.
- Some businesses presumed there was a “catch” to the no-cost.
- Having the offer presented by someone local helped them move forward to sign up.
- When asked if they needed more information about the Energy Trust staff, one participant said, “it doesn’t really matter to me, you’re welcome here if you’re with [the IVCDO representative].”

Barriers to Participation. Some businesses and building owners shared that they had not upgraded to LEDs for a variety of reasons in the past, including:

- Business owner was not the building owner so didn’t think they could.
- They were physically unable to do the work (disabled, elderly, etc.).
- The space had many things to repair and they had not gotten to lighting.
- Lacked awareness of the improved lighting quality and cost savings from LED lights.
- They would not replace lights that were not burned out (“if it’s not broke...”).

Klamath Lake Community Action Services – Community Capacity to Support Collaboration

KLCAS is the designated Community Action Agency (CAA) for Klamath and Lake counties. It is the regional nonprofit organization responsible for anti-poverty services and advocating for community members with low incomes. Created through the Economic Opportunity Act of 1964, the CAA network has been an integral part of the national effort to

alleviate persistent poverty. CAAs, and their nationwide network, are funded by the Community Services Block Grants, along with other federal and state grants.

CAAs in Oregon manage the low-income weatherization program except in Klamath and Lake counties where this service is administered through another nonprofit organization. Still, KLCAS is a critical connector for their clients to that program and other energy services providers and manages their own energy-related programs. KLCAS distributes the Low-Income Home Energy Assistance Program and Oregon Energy Assistance Program, federal and state initiatives that provide long-term energy assistance to low-income households. They also distribute a small amount of utility funded low-income assistance; one fund is specific for residents of “frontier” Lake County. They partner with IOUs to provide customer payments directly to the utilities, while also assisting clients to enroll in IOU income qualified bill discount programs. The office and energy staff serve as a community informational coordinator and distribute weatherization and other energy efficiency resources incentives.

In Klamath County, participation in programs for upgrades and efficiency was inconsistent despite need. For example, new home construction and residential renovation projects often neglected the benefits of improved energy efficiency in favor of lower up-front costs and fewer process steps. So, with older than average housing stock, many dilapidated rental properties, seasonal temperature extremes, and some of the lowest incomes and highest poverty rates in the state, those who could least afford high utility bills, were also most at risk of them.

Energy Trust conceived of supporting a staff position, located with KLCAS, that would work across the Klamath County organizations that have a role in residential energy. Energy Trust’s regional outreach manager approached KLCAS and other organizations to make the case. All agreed with the premise and need, and KLCAS willingly agreed to house the position.

Energy Trust and the collaborating organizations turned to the Resource Assistance for Rural Environments (RARE) program; an AmeriCorps program based at University of Oregon in Eugene. RARE trains and places graduate level young adults into rural communities to increase community capacity and improve economic, environmental and social conditions. Energy Trust has worked with the RARE program for a decade, helping to create a focus on RARE members working in the energy field. Energy Trust regional outreach managers mentor the RARE members and assist the community to help guide their energy-focused work. RARE members have helped plan resilience hubs for low-income communities following wildfires; assist communities with energy and greenhouse gas reduction planning; and help maximize federal energy funding for rural businesses and agricultural producers.

KLCAS has applied for and has been awarded an energy RARE member for the last two years. During this time, the RAREs have coordinated across all Klamath area organizations that have a role in residential upgrades, health and energy, from the Klamath Tribes to the county health and economic development agencies. They compiled a Klamath Basin energy resources guide that includes all energy-related agencies, programs, and incentives, with descriptions, qualifications and contacts. The guide is made available in locations readily accessed by people with lower-incomes and people of color, as well as online, and is available in both English and Spanish. KLCAS and Energy Trust share the cost of the RARE member position.

KLCAS and the RARE member's efforts have expanded to include holding a community-wide workshop with Energy Trust on upcoming energy-related federal and state funding. KLCAS also now routinely works with LCRI, an organization based in an adjacent community, to provide referrals and wrap-around services that leverage funding and resources. Energy Trust anticipates continuing to support this position for the Klamath Basin, as additional opportunities are identified to bring energy resources and efficiency upgrades to the county.

Lake County Resources Initiative – Established Community-based Program Delivery

LCRI is a rural environmental and economic sustainability organization located in Lakeview Oregon. It was started by local leaders and a rural visionary, Jim Walls, when he returned to Lakeview as a retiree, to help reverse the downward economic trend of his county. Jim and Lake County colleagues convinced federal forest land agencies to invest in LCRI's work in collaborative forest stewardship. They also pitched Lake County as a utility-scale solar generation development mecca, resulting in valuable new tax revenues for the local economy, and by Jim's calculations, a net-zero county greenhouse gas tally even when counting the cows. Energy Trust and their outreach manager had a long-established relationship with LCRI.

After Jim retired from LCRI, Energy Trust's outreach manager continued to work with LCRI, and the current and former energy RAREs by then on staff. Together they considered how to address residential and commercial energy efficiency especially for the community's most vulnerable low-income households and businesses. LCRI implemented an early version of Energy Trust's no-cost commercial LED lighting upgrade offer. They also explored ways to improve old and poorly maintained homes, including manufactured homes, in an area that experiences among the coldest temperatures in the state. As Energy Trust offers evolved, LCRI was enrolled as one of the first Residential Community Partner Funding (CPF) organizations particularly to serve low-income, elderly, disabled and Latinx households.

Through CPF Energy Trust works with community-based organizations to deliver services, upgrades and higher incentives to people who have not been adequately served by energy programs in the past. CPF organizations are trusted, local organizations known in their communities. There are currently 28 partners located around the state. Partners must serve, or develop an offer that serves, at least one of the following: People experiencing low to moderate incomes; Communities of color; Rural communities; Indigenous communities; Veterans; People experiencing disabilities; or Renters. CPF is offered through both the single family and multifamily programs, with support from Energy Trust field staff and outreach managers.

For the Residential single-family CPF program, community-based organizations facilitate the installation of home energy improvements for their clients. Partners provide energy saving recommendations and work with trade ally contractors to coordinate installations in customers' homes. In addition to providing guidance through home energy assessments, Community Partner Funding offers higher incentives to participants for HVAC, weatherization and water heating upgrades. These cover between 40-70% of project costs and, in some cases, cover the full project costs through a pilot for efficient heat pumps and insulation upgrades.

In 2023 alone, LCRI conducted 139 home energy assessments, well beyond contract expectations, and completed 55 efficiency upgrade projects, working directly with installers. Very few of these upgrades would have occurred if LCRI had not been the direct point of contact to the households and businesses. And importantly, LCRI has increased capacity to conduct their energy work in both Lake and Klamath counties, adding jobs to the challenging rural economy.

LCRI's long engagement with Energy Trust, as one of the first CBOs to pilot the delivery of efficiency programs to agricultural, industrial, commercial, and residential customers, has afforded the organization a measure of autonomy in the region. Energy Trust recognizes LCRI's community expertise, its growing competency in energy, and command of rural markets and regional contractor relationships. Because of LCRI's long engagement with energy programs, and their stellar reputation and work ethic, dozens of other organizations of all varieties seek them out for collaboration. LCRI has been awarded program administrator for Klamath and Lake counties for the Oregon Department of Energy's Community Heat Pump Program, with referral assistance through their close relationship with KLCAS. LCRI actively recruits contractors to work with energy programs, and they regularly create and support energy-related civic events.

Energy Trust Perspective - Relationship Development With Rural CBOs

Energy Trust's experience working with community-based organizations in rural communities shows that working directly with local, trusted leaders in communities overcomes barriers to participation and supports the growth of organizations that can expand services and deepen efforts in energy over time. Foundational to relationship development is recognizing that it takes time and needs to engender trust. To gain trust, energy organizations need to keep showing up, deliver on what is promised, and bring value.

Reflecting on what is working well as energy organizations develop relationships with CBOs is valuable and offers best practices to draw from as future efforts are designed. Energy Trust is not alone in this endeavor. In a 2022 blog post, another energy organization, Slipstream offered a set of similar reflections based on their engagement with a faith-based CBO (Vanover, Dortin, and Moring 2022).

The following are key learnings and guidance from Energy Trust for future efforts.

Cultural Competency. Develop skills, understanding and cultural competency internally to be knowledgeable of the organization and communities served.

- Be cognizant and respectful of the history and people's lived experience.
- Do not force a social or political agenda. Rural communities can be sensitive to "social engineering," rejecting those who come across as didactic, superior, or ill-informed.
- Respect both CBO and rural community perspectives, which may be different.
- Check rural biases that may exist among staff working with the organization.

Partnership Development. Select and approach community-based organizations thoughtfully. There is no "best kind" of CBO to do this work. Very different CBOs can have amazing success

with energy programming. If a CBO is indeed a good candidate for energy work, wait for them to be ready to do it and do not try to “talk someone into it.” Let them lead on timing.

Relationship development takes time and commitment to develop trust and mutual benefits.

CBOs generally engage with this work because of their mission to bring needed resources to their community. While the contract payments will benefit the CBO, remuneration is not the real driver; community benefit is.

Ultimately, working together must be co-beneficial. The CBO is typically at a power disadvantage; be committed to putting the CBO’s interests first. To this objective, energy organizations should set some internal criteria regarding CBO partner selection.

- Consider CBO characteristics, such as interest; mission alignment; capacity; leadership; longevity; and stability.
- Assess and budget for the amount and type of support needed to launch and maintain the CBO’s energy work.
- Be as clear as possible at the outset regarding how long this work may last and where it might lead to help determine the CBO’s appetite, capacity and mission alignment.

Energy organizations should consider the wider repercussions of their CBO collaboration. Working with CBOs is very different from working with professional program implementer contractors. CBOs are still customers, with whom energy organizations are contract-partnering to gain access to their communities. The CBOs are serving their own communities and their neighbors, who they will continue to see and interact with every day. They will not be moving on once a project is completed. They will continue to live with the responsibilities and consequences of their efforts. What they do matters to their personal and organizational reputations in the community and the success of their community organization to achieve its mission.

Listen to Learn. The most useful energy-related objectives and successful projects will be those that emerge from the community and align with the rural needs and priorities. So, gain an understanding of what is important to the rural CBO and the community, their priorities and challenges. Recognize that there is an existing relational landscape in which the CBO works, and which will be important to navigate, to not cause conflict or create duplication; upset balances; challenge critical funding opportunities; or interrupt ongoing processes.

Recognize CBOs face unique rural differences and challenges they will have to address and negotiate as possible. It will benefit the relationship to understand the landscape in which the CBO is operating. Challenges can include:

- Many rural people value self-reliance and have learned to live with truly little assistance and few amenities, making the introduction of changes challenging.
- Rural homes are rarely “cookie-cutter.” Many were built before building codes or enforcement, or built without permits, so upgrades can be more challenging.

- Lack of available contractors is regularly identified as the greatest CBO challenge affecting energy work.
- Travel distances, compounded by weather events, can be long and treacherous, adding to time and transportation costs.
- Rural areas can regularly experience intense natural disasters, like wildfires, which alter priorities while also highlighting the need for improved resilience.
- Gaps in communication services and frequent utility outages are common.

Implementation. Putting the programming together can follow a kind of recipe, but ought to be unique, interactive and responsive to each CBO and to their operating conditions along the way, and aligned with the capabilities of each organization.

The roles for both parties need to be established and understood. The CBO will be best to lead in those areas of work that are closest to the community, such as community relations, messaging, outreach strategies, networking, and so on. While energy organizations bring energy expertise and industry knowledge, energy products, programs, opportunities, funding, and overall support for the CBO, they can lead and contribute to the CBO's successes with:

- Energy programs have systems, protocols, processes, and already conduct reporting, contracting, etc. This is infrastructure that can be leveraged.
- Energy programs can bring training to transfer to the CBO the practical and technical information necessary for them to provide the designated service(s) confidently and competently to their community.
- They can offer industry context for the CBO to better understand the relevance of their work.
- Energy programs have contractor contacts and protocols that can be provided to the CBO.

Energy organizations need to establish the structure underpinning their CBO support. It is best to have a single point person for contact. The energy organization should be available as needed by the CBO, and also provide timely assistance for the CBO's customer and contractor questions, problems, or conflicts. The energy organization needs to be prepared to step in when issues become elevated and are outside of the realm of the CBO.

CBO compensation needs to be equitable. CBOs provide essential, invaluable community access. Their ability to help an energy program achieve its mission should be adequately compensated. Do not expect anyone, including a CBO, to work for free, offer work space for no cost, organize a community meeting or donate their time. Energy organizations must be prepared to pay for rural organizations' and individual's information or consulting services to further a energy organization's understanding of the rural community and landscape or to identify business opportunities.

Energy organizations must be clear about time, resources, and capacity to undertake and achieve this work at the outset.

- Provide the CBO with enough information to allow for good decision-making.

- Consider if additional capacity is needed for CBO success, and plan and budget for it.
- Recognize that small, rural CBOs with few staff have to do it all, and do not have back up. Things may not get done in the anticipated time frame.

Phasing the energy work and any increasing complexity is a useful strategy that takes into account CBO capacity and developing abilities. It is best to determine early where and how to start the CBO's energy work, such as with less complicated initial "no-cost" offers. Next, create an implementation plan together that is reasonable and feasible. Then, depending upon experiences, successes, and desire and ability to do more, collaborate on an expansion plan. Be flexible to scale back or scale up according to the CBO's abilities and desires.

Whenever possible, provide longer-term contracts for CBOs. Rural CBOs typically lack capacity, staff, and financial stability. Providing certainty in funding resources helps them function and achieve the work to advance energy improvements in underserved, rural communities. Certainty in funding helps to alleviate the perceived instability of the prospective job and can attract more qualified candidates.

Rural CBO Perspective - Relationship Development With Energy Programs and Funders

The following captures the experience and advice provided by rural CBOs engaged with Energy Trust during various efforts. While these points may not all be representative of each CBO, they are generally distilled from the aggregated input.

Partnership Development. A successful CBO relationship with an energy organization depends on strong partnerships and collaboration to achieve the organization's mission. If done correctly, the benefits of partner relationships can be profound in terms of the delivery of greater community benefits and the direct provision of resources.

Partnerships such as these with energy organizations expand CBO capacity and help build organizational vitality. Strong partnerships build internal and external capacity that can make the organization more resilient, nimble, and responsive to changes, such as in funding availability.

At their core, these partnerships allow CBOs to effectively bring critical resources and solutions to their communities. With direct customer input resulting from delivering energy services and offers, CBOs can reach new customers by being able to better address reasons for customer non-participation: won't accept something from someone else, too self-sufficient; lack of knowledge about benefits or technology; attitudes block openness to new ideas; energy not a priority; can't afford anything even with incentives; landlords don't invest in their rental properties.

Partnering through Energy Trust programs has extended CBO capabilities and subsequent reach to additional new energy partners, in turn, further growing capabilities and community benefits. CBOs that lack the capacity to engage in these partnerships can benefit from seeking assistance through available programs, such as AmeriCorps and specifically, Oregon's Americorp RARE program, to gain the needed capacity.

Selection and Purpose. CBOs should select energy organizational partners thoughtfully and carefully. Among the relationship characteristics to highlight are the following:

- Recognize trust as foundational to all successful relationships.
- Determine mission alignment with the partnering organization and take care to not be diverted from primary mission and community.
- The best partners will be honest, supportive, clear, and open to CBO input.
- Assess the stability of the energy organization and their commitment to rural.

CBOs generally need to stay community-connected, continually learning from and providing services and guidance to their communities. Staying perpetually aware of community conditions and needs is a value to partnering energy organizations. This makes the CBO a conduit of information and opportunities to and from the community and the energy services provider, helping to align energy offers with community needs.

Implementation. CBOs know their communities and how best to provide information and services to community members. CBOs are good at tailoring outreach approaches to subsector customers in their communities that would otherwise be unseen by someone from the outside. They know how to get the word out to customers and utilize culturally appropriate approaches. With adequate support from energy organizations, collaborative program design, and the right offers, many CBOs are perfectly positioned to deliver both energy savings for the industry and valuable improvements for their communities and people. Along the way, they can build expertise and capacity to strengthen their organization and their ability to provide community services.

CBOs need to ask energy organizations to prepare and provide mechanisms or tools to keep CBOs informed and up to date. This is especially important should the energy organization be figuring out their plan as they go, or when there are changes to direction, programming, funding, and offers.

Through implementation of energy programming, rural communities can greatly benefit through the CBO's gained expertise in energy-related work and the technical and practical resources and skills brought to rural regions. Rural CBOs need to ask for support to increasingly develop energy skills and knowledge, including support for and provision of ongoing energy-related training, and for pursuing energy-related certifications and licenses, education in energy-related trades, and the purchase of energy tools and equipment, as applicable.

CBOs benefit from a single point of contact within the energy organization that is responsive to and responsible for managing the relationship. Among other benefits, having single points of contact streamlines communication and saves time.

Rural CBOs benefit from longer term contracts for energy-related work. Shorter term contracts make it more difficult to find or attract available and qualified people to conduct work, and with limited capacity it may take longer to design and ramp up effective programs. CBOs should be clear about the intentions of the energy partner with regard to longevity of the work.

Through implementation, CBOs develop practical and viable ideas for improving incentive offers, to make them more targeted and effective for uptake and acceptance and improved customer service. The CBO-energy organization relationship will benefit from a robust exchange of ideas regarding energy programming.

Benefits to the Organization, Community and Customers. The partnerships can result in significant cost savings on customer utility bills, improved occupant comfort, and healthier living and working environments. Funding transferred from energy organizations to rural CBOs to effect efficiency improvements in rural, underserved communities has a strong community economic multiplier effect, that can collectively work to buoy a stagnant or recessed rural economy and improve the lives of the rural community members. Health and economic outcomes improve for vulnerable community members. The following is a list of benefits observed among these rural communities.

- Energy funding provides critical support to residents and business/building owners to improve energy efficiency, saving money that can be used to meet other needs.
- Home energy improvements add value to the home and may stimulate further home improvements, uplifting neighborhoods. Such upgrades can be especially meaningful in low-income rural communities with older and sometimes dilapidated housing stock.
- Increased residential comfort and a sense of well-being can result in improved health and wellness, reducing overall medical expenses, and lowering community health needs.
- Successful customer exchanges can increase participation in other available services.
- Funding paid by energy organizations to rural CBOs to implement rural community energy programming helps to stabilize the CBO and supports staffing (job creation and retention in low-income, high-unemployment, rural communities). Stable, rural CBOs are more attractive funding recipient candidates for additional grant and loan monies.
 - This adds to the CBO's ability to solicit and attract additional funding.
 - Additional funding further increases the CBO's stability and the expansion of programming and benefits to the community.
- Building CBO-contractor relationships and networks to increase energy work can influence progress for other types of work and projects in the community.
- The work supports local contractors and trades, potentially creating new jobs.
- The CBO has an avenue to directly support community member resilience, such as from effects of extreme temperatures or wildfire smoke.
 - CBOs may refer to this as improving infrastructure rather than using climate-related terms – keeping the work neutral regardless of views.
- The energy work has stimulated greater collaboration and project planning across community-based service organizations inside and outside of their regions. As an example, energy efficiency improvements are linked to social determinants of health, and increases the interest from potential health industry partners in collaborative efforts

The Bigger Picture – Future

Among the ways CBOs can work more deeply in the future include workforce development, creation of new offers, and revolving loan funds to support rural energy improvements. Rural CBO energy program implementers can be the front end of an evolving rural energy knowledge economy and can help to shore up struggling rural economies. Conceivably, the rural CBO's energy initiatives could serve to stimulate energy-related business development that would better support regional energy improvements and installations, and close service gaps. Assisting rural energy-based expertise to grow vertically, including energy assessors, builders, installers, contractors, engineers, vendors, and product designers, developers, and project owners, would improve the current economic trajectory.

Additionally, CBOs should be engaged in measure development with Energy Trust and others to affect what is best for their communities, especially when working toward climate resilience, electrification, and greenhouse gas reductions. For example, opportunities to explore microgrids for rural communities that experience routine power outages or are at elevated risk of disaster-related grid disruption, promotes rural resiliency in an uncertain future.

Finally, CBOs get frustrated by not being able to better help very low-income and vulnerable customers when there are not enough financial resources to move an efficiency project forward. Energy organizations can identify ways to transfer funding – such as revolving loan funds to qualified CBOs – so that trusted CBOs can lend energy improvement funding to home and business owners. Such funding empowers the CBO, providing them with long term development capital and stability opportunities, as they facilitate efficiency improvements for low-income, underserved people, with resulting compounding community benefits.

Conclusion

It is conceivable that to meet energy goals there will be increasing motivation within the energy industry and beyond to work with communities to design energy solutions that are tailored to the customer, community or need. This will require fundamental shifts in how this work is approached and the solutions available for program design and delivery.

Energy Trust has learned through collaboration with CBOs in rural communities that trusted partners can customize and shape solutions that deliver participation levels not achieved through standard, traditional approaches. The considerable opportunity and innovation in rural communities supported with solid, trusted relationships can result in significant energy savings while also making additional community, economic, and resilience benefits possible.

Energy organizations should be prepared in this changing landscape to let go of power and decision-making control to affect rural equity. Decentralizing and shifting decision-making authority for energy solutions into the purview of the people and communities who need workable solutions, can, among other things, avoid distant policy making without on-the-ground knowledge. Additionally, work may be arguably better accomplished and at lower cost when done with fewer levels, and when locally executed by expert CBO community members.

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