

Distribution Systems Planning (DSP) Community Engagement Best Practices and Recommendations

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1.0 Introduction

Portland General Electric Company (PGE) has partnered with the Coalition of Communities of Color (CCC), Unite Oregon, and Community Energy Project (CEP) to develop, facilitate, and synthesize findings from two pilot workshops designed to engage Black, Indigenous, and people of color (BIPOC), immigrant and refugee, and low income communities in Oregon. The two pilot workshops are part of community engagement activities that utility agencies are required to perform by the Oregon Public Utility Commission's (OPUC) Distribution Systems Planning (DSP) Guidelines. The pilot workshops were held on Saturday, May 22 and Sunday, May 23 and each lasted for three hours (9am-noon). Participants were provided with a \$250 stipend for attending both workshops.

The purpose of this report is to share back with PGE the results of feedback from participants and partner teams (Unite, CEP, CCC). The report concludes with recommendations for PGE's Community Engagement Plan.

PGE's approach to gaining insight into a Community Engagement Plan was to collaborate with community-based and community-led organizations during the development and rollout of the pilot workshops. The roles of each organization during the process were as follows:

Community Energy Project (CEP) worked with energy systems content specialists to ensure that baseline knowledge about technical information is conveyed in ways that are relevant to community members, accessible, and approachable. Staff from CEP co-led both workshops.

Unite Oregon worked with CEP to ensure that storytelling, interactive activities, and other modes of participant engagement were included throughout the workshops. Unite recruited participants from four of its chapters including Clackamas, Multnomah, Rogue, and Washington counties. Unite, in collaboration with CCC, also developed the participant feedback tool. Staff facilitated the interactive parts of the workshop.

Coalition of Communities of Color (CCC) contributed feedback on the presentation slides for both workshops. Staff members attended and observed both workshops, and documented participant feedback throughout the workshops. CCC synthesized and analyzed quantitative and qualitative data, and provided PGE with recommendations for the Community Engagement Plan (this report).

Collaborating with community-based partners ensured that the process centered the needs, strengths, and desires of communities. The approach taken by Unite Oregon and CEP was to focus on:

- Accessibility of technical information, including availability of interpreters, providing technical/digital support, and incorporating interactive and discussion-based content
- Relevance of information to community members' lived experiences
- Trust- and relationship-building with historically marginalized communities
- Capacitating and investing in community-led organizations and processes

In addition, community-based partners have a deep understanding of the current engagement context, including the challenges and opportunities due to the need for remote/online engagement. For instance, different considerations arise when engaging remotely (as opposed to in-person and in physical spaces) such as providing live transcription, ensuring that slide decks are multilingual, practicing the content with translators, including interactive online content, and presenting information using images and limited text. Community-based organizations (CBOs) also understand the amount of time and money it takes to genuinely engage communities. CBOs have often invested resources into building long standing relationships and trust with communities; however, engagement is an ongoing process, rather than a one-off, and conducting outreach for any new project requires significant resources.

The remainder of this report presents the findings from data collected from:

- Notes from meetings with PGE, CEP & Unite (during the planning process and workshop debrief session)
- Notes from attending and observing both workshops
- Participant registration data
- Post-workshop surveys

The report concludes with recommendations for PGE's Community Engagement Plan. These recommendations are synthesized from participant feedback about the two pilot workshops and from community partner feedback about the workshops and general process.

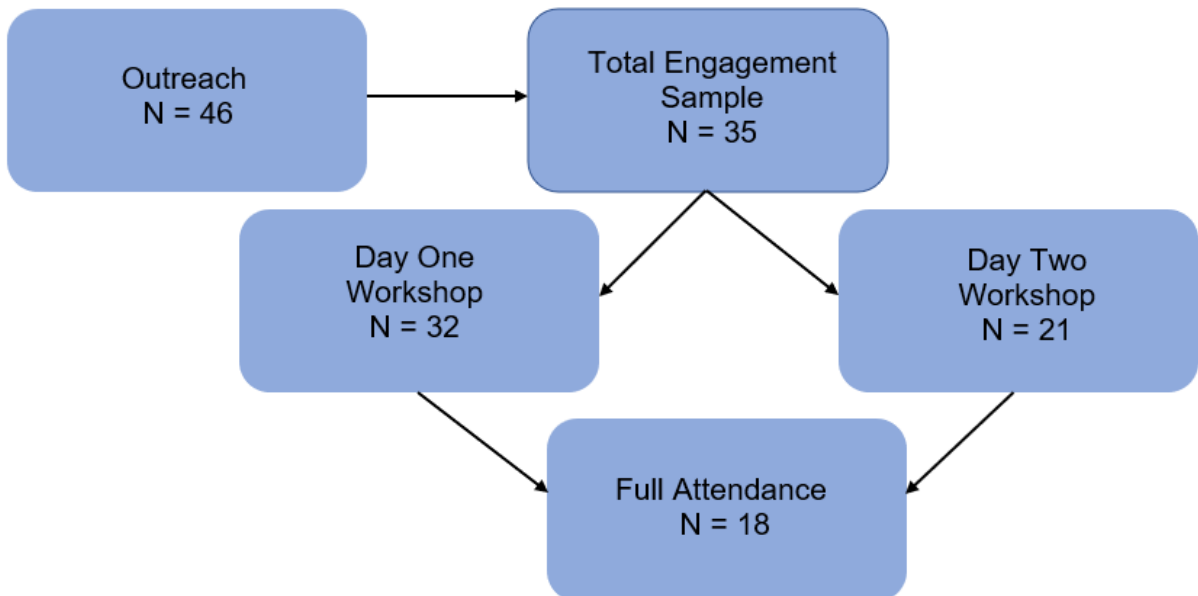
2.0 Method

Before presenting the results of the data collected during the engagement process, we discuss some methodological considerations, including: how data was organized, why demographic data is needed, and how quantitative and qualitative data was analyzed.

2.1 Sample Size

The outreach sample size is composed of the community members that completed the registration survey. Total sample size of participants who engaged with either the first and/or second workshop is $N = 35$. Among those who attended the workshops, more people attended the first workshop ($N = 32$) compared to the second workshop ($N = 21$). Additionally, 3 of the 21 participants that attended the second workshop were not present at the first. Total outreach and engagement sample sizes are represented in Figure 2.

Figure 2. Number of community members outreached and participants in engagement



Note: The total engagement sample N counts the 18 participants who attended both workshops once. The 18 participants also comprise the full attendance sample.

2.2 Participants

Participant demographics were gathered in the registration survey and the first workshop survey. Due to this, the participants that only attended the second workshop or were unable to complete the registration survey demographics are missing from the current analysis. The majority of the participants in the workshops identified with the Lantix community (54%), followed by the Black community (18%) and the Asian American and Pacific Islander (AAPI) (18%). Many participants required language interpretation (34%), of those who needed support needed Spanish interpretation. Few participants (< 1%) needed technical support such as visual accommodations and access to a computer. The majority of participants identified as heterosexual/straight and all the participants indicated that they were cis-gender¹. Lastly, the majority of participants (47%) were affiliated with the Clackamas County Unite Oregon chapter and 41% of outreached participants were affiliated with PGE. All participant demographics are represented in Table 1 in appendix A.

2.3 Importance of Demographic Data

The registration and day one workshop post-survey asked for an extensive amount of demographic information on participants' identities and communities. There are many technical reasons for this information, for example understanding language and accessibility needs. However, the importance of gathering detailed demographics is not only technical, but it is also vital in the practice of data justice because it makes those who are marginalized visible, thus making institutions more accountable². Institutional research endeavors have had a long history of being either exploitative or neglectful of marginalized communities². In a time of increased awareness of the power of data, researchers need to ensure that their data is serving communities rather than using them. This means collecting information on race/ethnicity, sexual orientation, and gender identity as well as disability, immigration, refugee, and socio-economic status. All of these factors not only influence how participants may interact and react to the workshops, but also assists PGE and partners in understanding which communities need more intentional outreach. Based on the demographic information we gathered we know that participation from LGBTQ people of color, those with disabilities, older adults and those within the Arab, Middle Eastern, and Muslim communities was lacking in the workshops. These are communities that are impacted by utility burden and need to be present during future conversations.

¹ Cis-gender refers to individuals who gender assigned at birth matches the gender they identify with.

² Taylor, Linnet. 2017. "What is data justice? The case for connecting digital rights and freedoms globally," *Big Data & Society*, July-December 2017:1-14

2.4 Data Sources and Analysis

In total there were three surveys participants completed, the analysis includes quantitative and qualitative data from each survey.

Demographics. Demographic data was compiled using the registration survey and the day one workshop survey. Participants' race/ethnicity, age, refugee status, immigrant status, income, renter status, disability status, Unite Oregon, and PGE affiliation all derived from the registration survey. While sexual orientation and gender identity (SOGI) was collected in the one day workshop survey. Some participants were unable to complete the registration survey, thus their demographic information is not represented in the current analysis. Similarly, not all the participants in the workshop completed or attended the first workshop, thus their SOGI information is not represented in the current analysis.

Quantitative Analysis. Quantitative analysis included data from the workshop surveys. There was only one quantitative item that was offered on both surveys, which were taken after the workshop. Participants were asked, "How well informed and confident do you feel to engage with discussions and decisions about energy in Oregon?" Participants indicated knowledge and confidence on a 4 point scale [1 = still unclear - 4 = fully informed and confident]. Demographics and quantitative responses were analyzed using Excel descriptive statistics.

Qualitative Analysis. The qualitative analysis is compiled from both workshop post-test surveys. Participants were asked three open ended questions:

1. What topics discussed in this "Electricity and Climate Resilience" workshop did you find the most useful and/or informative?
2. In what ways, if any, do the topics discussed today directly affect you and your community?
3. How could the workshop have been improved? Any other thoughts you would like to share with us?

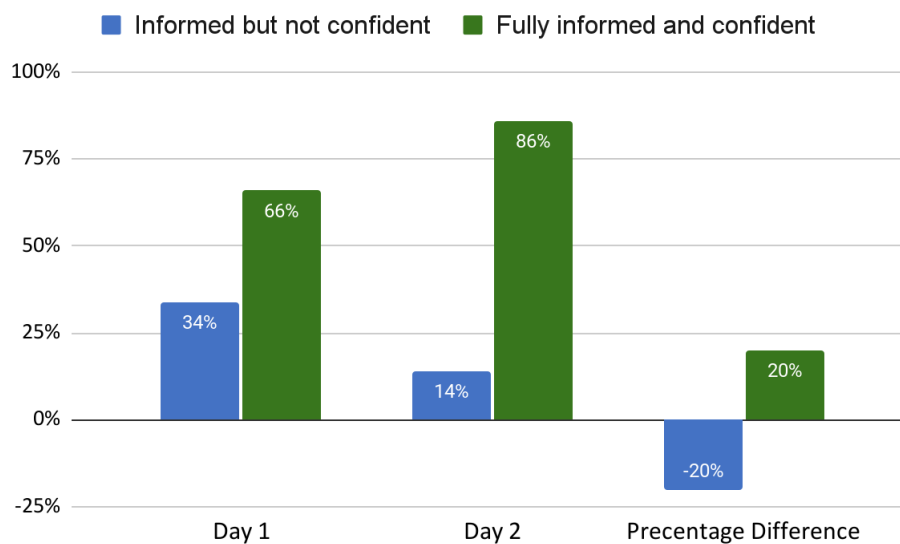
Qualitative data was gathered from both workshop post-test surveys. Responses were then synthesized by researchers and summarized in the analysis. Additionally, throughout the workshops participants were given opportunities to discuss the experience with energy individually and amongst their communities. These stories and other observations were also valuable data gathered in order to inform CEP Unite and CCC's recommendations.

3.0 Results

3.1 Informed and Confidence Analysis

Participants' knowledge and confidence after both surveys were very high, all participants indicated that they were either “informed, but not confident” or “fully informed and confident.” Participants indicated that they were more confident and informed in the second workshop compared to the first. This difference between the workshops may have been more pronounced if all of the participants were present at the first workshop (three participants were not present). Percentage of “informed but not confident” and “informed and confident” responses for both workshops and the percentage difference between responses are represented in Figure 3.

Figure 3. Informed and confidence level comparing workshops percentage difference.



3.2 Highly Rated Topics Among Participants

Participants were asked what topics were the most useful after each workshop. Many participants indicated that all the topics were useful, but some topics were highlighted by participants more than others. On day one, the participants valued the information about:

- Reducing and saving energy (including peak hours),

“toda la informacion me fue muy util ya que no sabia de donde proviene la luz, ahorrar luz estar preparados para desastres naturales mucha informacion que me gusto y aprendi bastante gracias.”

English Translation

All the information was very useful to me since I did not know where the [energy] comes from, how to save [energy], be prepared for natural disasters. There was a lot of information that I liked and I learned a lot, thank you.

- Where energy comes from (including the modern grid system),
- The consequences of fossil fuel and the benefit of renewable energy.

On the day two workshops included a review of the topics introduced in the first workshop and it is important to note that a few of the participants were not present at the first workshop. Regardless, participants indicated that the following topics were very available to them:

- Microgrid and example of energy resilient community and connection with institutional or structural conditions
- How to save and reduce energy use
- Strategies for saving energy and other environmental resources

“I was interested in learning about microgrids. I have not seen that or heard about that before until today. It was also interesting to go over the types of smart technology.”

Many participants indicated that they were previously not aware of the topics discussed in both workshops. This highlights how important accessible introductory workshops are among community members.

3.3 Community Effects and Needs Regarding Energy Systems

Participants were asked about how the topic discussed in both workshops affected themselves, and their communities. Participants indicated that many ways in which climate change, energy costs and other factors influenced their communities. Some of the most repeated effects were:

- Communities are still reeling from recent natural disasters, such as the fires,
- Communities survive disasters through mutual aid, but do not have the resources to prepare for or prevent future disasters,
- Energy efficiency is not as accessible for all renters.

“Afecta las calefacciones que tienen nuestros apartamentos ya que son viejas de tecnología lo cual gastan más luz y aparte comentaron hoy en la meeting que no deberían de estar abajo de las ventanas”

English Translation

It affects the heating in our apartments since they are old technology which uses more [energy] and they also commented today at the meeting that they should not be under the windows.

Participants also offered their needs in regards to these topics which included:

- More community centered education and resources on energy saving are needed
- Communities need to be alleviated from cost barriers to resources in renewable

“...I do think it is important not to just put the [climate change] burden on communities but to also hold governments and corporations accountable. It is more like a top-down approach.”

- energy, weatherization, and smart technology,
- Communities are still reeling from COVID-19 and need support in utility payments
 - Communities need more government and corporate agency on addressing climate change
 - Vulnerable communities, such as low-income, rural, renters, BIPOC, and those who work outside, need more support in energy saving and protection from climate change.

3.4 Participant Suggestions for Future Workshops

Co-creating a brave space with community members of different backgrounds, languages, and abilities is a difficult feat that requires time to practice, reflect, and reconfigure. Many of the participants gave positive feedback, which reflects the efforts of Unite Oregon and their partners. However, even amongst experts in community organizing, there is always room for improvement, which was reflected by the participants as well. Some of the suggestions made by participants were addressed in the day two workshop. For example, many participants on the day one workshop mentioned having difficulties understanding the presentation due to language barriers. This was addressed in the day two workshop by adding a slide better explaining how to use the interpretation features on Zoom. Additionally, participants also requested having more interactive learning and engagement tools during the presentation. This was addressed by adding more online learning tools, such as JamBoard, during the day two workshop.

Other suggestions could not be addressed in the day two workshop. Participants wanted more information about energy in different systems such as person, community, and institution as well as more information about efforts to address energy and climate burden among vulnerable communities across the nation. Participants also requested more resources for more energy saving techniques, examples of energy resilient communities, and educational opportunities so they can be more informed and make better energy decisions. What is most apparent from these comments is that community members need more engagement through community based organizations, more information about energy/climate change in their communities, and more investment from institutions like PGE. Workshops like these are rare for marginalized communities, due to this they are often left out of important decisions. However, this exclusion does



“... It isn't every day you can have a community of like-minded people - come and speak about such topics.”

not have to continue, and through these workshops, we have been able to provide recommendations to change that practice.

4.0 Recommendations

Workshop Reflections:

- Begin with stories -- stories allow for people to connect early on in presentation
- Center an environmental justice (EJ) lens (e.g., how to balance PGE's goals with EJ goals?)
- Utilize a popular education model (high degree of participation expected from everybody) by using trivia, polls, jeopardy model (answers first - participants guess the questions), etc.
- Including various pauses/prompts for people to process and relate to was helpful
- Discuss different levels of climate resiliency, EJ, and energy topics/issues: personal, community, and institutional/governmental levels.
- Include action items early on and provide information about community based organizations (CBO) with resources
- Integrate energy-related resources throughout the workshops and time to discuss/explain
- Set aside time to discuss strategies for reducing energy-burden and consumption, and how communities can access renewable energy sources at lower costs
- Learn from the community - "what tips and tricks do participants have?"
- Include more community-based examples/strategies of climate resiliency (e.g., CA microgrid example)
- Invite and involve more CBOs in the workshops
- More clarity about "why" these conversations are needed now -- what laws, regulations, etc. are important to know about?

Community Engagement Reflections:

- Budgeting for community engagement must include:
 - At least 4-6 months of planning in partnership with community-based organizations for outreach, recruiting, event planning (if in-person), coordinating with interpreters, facilitators, and back-end support, procuring transportation, food, child care (if in-person), etc.
 - Stipends for all participants
 - Funds for possible future re-engagement (e.g., sharing outcomes and vetting feedback)
- Prepare and practice with interpreters (Unite's model)
- Building community-based feedback loops into engagement plan
- Share back community engagement findings and how those findings are

- influencing future decision making with community members
- Incorporate pre-workshop survey/evaluation to gauge expectations versus experience
 - Develop a sheet of terms/glossary
 - Use [REaL-D](#) and [SOGI](#) format (SOGI forms are still being drafted and vetted; we recommend using B. Demographic Questions section only) on participant evaluation tools/surveys to better capture demographic diversity of participants

Appendix A

Table 1. Demographics of participants outreached and those who engaged in the workshops		
Categories	Outreach Sample N = 46	Engagement Sample N = 32
Race and Ethnicity	Percent (count)	Percent (count)
Black Communities (e.g., African American, Afro Caribbean, and North African) and Black African ³	22%(10)	18%(5)
Latinx Communities	52%(24)	54%(15)
AAPI/Asian Communities	11%(5)	18%(5)
Arab, Middle Eastern, and Muslim Communities	4%(2)	0%(0)
Person of Color	65%(30)	55%(16)
Language and Accessibility Needs		
Needed Translation in Spanish	30%(14)	34%(10)
Needed Technical Support ⁴	8%(4)	7%(2)
Participant Statuses		
Is an Immigrant	48%(22)	55%(16)
Is a Refugee	11%(5)	10%(3)
Identities as Low Income	70%(32)	62%(18)
Is a Renter	59%(27)	59%(17)
Has a Disability	2%(1)	0%(0)
Age		
18-24 years old	33%(15)	45%(13)

³ This category aggregated Black and Black African community members, one participant Identified as Black African

⁴ Computer, internet access, and visual impairment considerations (e.g. larger font size and color contrasts) were barriers to participation. This data was gathered in the registration survey and only two participants with needs attended a workshop.

25-34 years old	11%(5)	10%(3)
35-44 years old	33%(15)	28%(8)
45-54 years old	11%(5)	10%(3)
55-64 years old	4%(2)	3%(1)
65-74 years old	4%(2)	3%(1)
Gender Identity⁵		
Woman/Girl/Femme	-	68%(23)
Man/Boy/Masculine	-	26%(9)
Transgender or Gender Non-conforming ⁶	-	0%(0)
Unsure of their gender	-	0%(0)
Sexual Orientation		
Heterosexual/straight	-	59%(20)
Bisexual and Pansexual ⁷	-	12%(4)
Questioning	-	12%(4)
Queer	-	6%(2)
Lesbian or Gay	-	0%(0)
Did not want to share sexual identity	-	6%(2)
Unite Oregon and PGE Affiliation		
Multnomah County	16%(7)	24%(8)
Rogue Valley	16%(7)	9%(3)
Washington County	22%(10)	18%(6)
Clackamas County	47%(21)	47%(16)

⁵ Gender identity and sexual orientation demographics were not collected in the registration survey

⁶ Transgender refers to individuals whose gender is does not match their gender assigned at birth. Gender non-conforming refers to any one who does not identify with a binary gender (male or female). In this table, transgender and gender non-conforming includes transgender, agender, non-binary, or unsure of their gender identity.

⁷ This category is aggregated, among bisexual and pansexual participants 2 identified as bisexual, one identified as pansexual, and one identified as either sexuality

PGE Affiliation	41%(19)	48%(14)
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