



Diversity, Equity, Accessibility and Inclusion Action Plan Review

Citizens Advisory Committee

April 2023

Inspired by the CAC

The 2020 CAC Equity Statement inspired the Board of Directors to ask staff to develop a comprehensive DEAI Policy and Action Plan.

This Action Plan a result of that process.

*Thank
You*

Action Plan Development

- Intended to implement PCE's DEAI Policy passed Oct 2022
- Includes recommendations from needs assessment and stakeholder engagement phase
- Developed by equity consultants GCAP
- Strengthened by staff:
 - Added measures to cover all departments
 - Incorporated feedback from all department heads



DEAI Action Plan Outline

Executive Summary

Foundation for Strategic Goals

Purpose and Elements

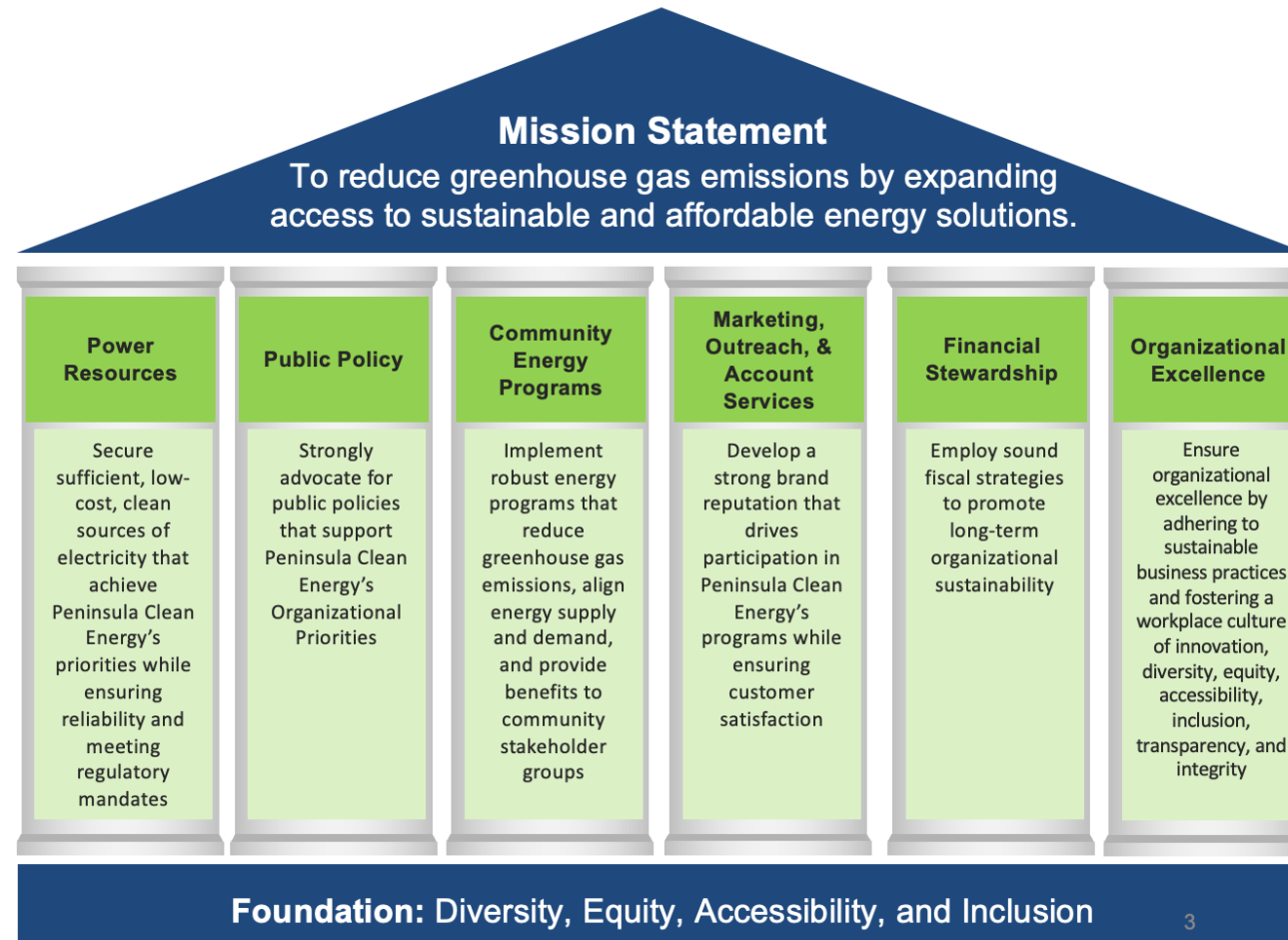
Gap Analysis Summary

Action Plan (43 Actions touching all departments)

Getting Started and Evaluation

Appendices

Foundation of Strategic Goals



Area of Focus	DEAI Goal Description
Organizational Culture and DEAI Commitment	<ul style="list-style-type: none"> Advance DEAI within PCE’s workforce, business practices, policies, and programs.
Human Resources, Staffing, and Recruitment	<ul style="list-style-type: none"> Create a workforce that is more representative; provide equitable access to employment opportunities for underrepresented members of our communities.
Training and Development	<ul style="list-style-type: none"> Require employees to complete DEAI related training, and encourage Board and CAC members to do so as well.
Energy Program Development and Implementation	<ul style="list-style-type: none"> Define energy equity and set goals and metrics for achieving it through our programs. Increase input and feedback from diverse and low-income communities.
Marketing and Account Services	<ul style="list-style-type: none"> Improve awareness, communication, and accessibility of PCE customer service, among low-income, disadvantaged, and limited English proficiency customers.
Vendor and Energy Supplier Diversity and Social Responsibility	<ul style="list-style-type: none"> Ensure that the vendors and suppliers that do business with PCE are environmentally conscious and have equitable business practices. Create opportunities and eliminate barriers to equal participation for all vendors.

Organizational Culture and DEAI Commitment

Advance and promote diversity, equity, accessibility, and inclusion within PCE's workforce, business practices, policies, and programs.

Actions	Steps	Timeline	Lead	Metrics	Recommendations
Establish a DEAI Action Plan Dashboard within the Strategic Plan, and incorporate into the annual staff performance review process	<ul style="list-style-type: none">▪ Deploy a visual, user-friendly dashboard to track DEAI Action Plan initiatives and include information on the following: alignment to Strategic Plan and DEAI Policy, lead department/staff, progress status, next steps, recommendations to improve, etc.▪ Integrate accountability for implementing actions outlined in the DEAI Action Plan into staff annual performance review process	Q2 2023	DEAI Lead and Council	<ul style="list-style-type: none">▪ Strategic Plan Dashboard has been deployed and is tracked on an on-going basis▪ All DEAI Action Plan initiatives have been assigned to a lead department/staff to follow through▪ Staff annual review process has been updated to include a requirement for specific reporting on each DEAI action assigned to specific staff	<ul style="list-style-type: none">▪ Deploy a dashboard that is easily manageable by the agency (see Appendix C for an example)▪ Consider incorporating into existing Strategic Plan Dashboard▪ Dashboard should be reviewed regularly with executive leadership team for awareness, feedback.

Organizational Culture and DEAI Commitment 2

Actions	Steps	Timeline	Lead	Metrics	Recommendations
Establish DEAI Framework for Decision Making	Develop a list of DEAI questions to consider and ask before producing policies, programs, practices, and decisions	Q2/Q3 2023	DEAI Council	All employees are aware of these DEAI questions and have implemented into daily practices	<p>Consider including the following questions:</p> <p>Who is this work positively or negatively impacting?</p> <p>Have you considered gender, race, religion, physical ability, location, socioeconomics, etc.?</p> <p>Who could be excluded by this work?</p> <p>Does this work impact groups differently?</p> <p>What does the data say?</p> <p>Has this work been communicated transparently?</p> <p>Could this work hinder feeling of belonging, especially in underrepresented groups?</p> <p>How will you ensure criteria is fair and transparent?</p>

Additional DEAI Commitment Actions

- Adopt DEAI Policy
- Adopt DEAI Action Plan
- Form DEAI Council
- Appoint a DEAI Lead
- Annually review and ensure that Peninsula Clean Energy's Legislative and Regulatory Policy Platform section on environmental justice and affordability is meaningfully implemented
- Participate in CPUC proceedings regarding energy affordability and environmental justice in consultation with environmental justice networks

Human Resources, Staffing, and Recruitment

Create a workforce that is more representative and inclusive of people of all backgrounds; provide equitable access to employment opportunities for underrepresented and underserved members of the communities PCE serves.

Actions	Steps	Timeline	Lead	Metrics	Recommendations
Increase the diversity of our staff team	<ul style="list-style-type: none"> Research and diversify places we advertise our job opportunities Analyze workforce needs, qualifications and work with hiring managers to determine bona-fide qualifications Gather current data to understand the ethnic, gender, disability, veteran composition of our communities so that PCE can strive to be reflective within its workforce Identify and remove artificial barriers to entry 	Ongoing	Leadership and Human Resources	<ul style="list-style-type: none"> Number of open and filled positions with diverse employees Outreach to diverse communities during recruitment Monitor changes in diversity of the candidate pool throughout the interview and hiring process Leadership, especially hiring managers, increased diversity in the workforce 	<ul style="list-style-type: none"> Prioritize open management positions, especially senior manager roles Use S.M.A.R.T. (specific, measurable, attainable, relevant, and time-bound) goals to establish your strategic diversity goals

Additional Human Resources Actions

- Finalize and Adopt DEAI Revisions to the Strategic Plan, Employee Handbook, Policy 9, and Policy 10
- Actively Outreach to a Diversity of Communities/Groups in Recruitment Process
- Ensure Salary Transparency
- Enhance DEAI in the Application and Interview Process
- Integrate DEAI Metrics in Employee Performance Reviews
- Launch a Self-ID Campaign

Additional Training and Development Actions

- Finalize and Approve DEAI Training Plan (See Appendix D)
- Select Training Method & Develop Training Courses
- Provide Training on How to Respond to an Accommodations Request
- Provide Training on Community Engagement for Program Planning
- Ensure Professional Development Opportunities are Available and Accessible

Energy Program Development and Implementation

Define energy equity and set goals and metrics for achieving it through our programs. Increase input and feedback from diverse communities, especially low-income and disadvantaged groups, to improve equity in program development and implementation.

Actions	Steps	Timeline	Lead	Metrics	Recommendations
Create Organizational Definition of and Goals for Energy Equity and Incorporate into Programs	<ul style="list-style-type: none">• Research energy equity frameworks and definitions• Create energy equity definition, goals, and metrics for PCE• Solicit input from community stakeholders, CAC, and Board and finalize based on feedback• Implement, including evaluating current and future programs for how well they meet these goals and what changes need to be made	Q2 2023	DEAI Council, Director of Programs, Programs Team, Director of Account Services	<ul style="list-style-type: none">▪ Energy equity definition, goals, and metrics drafted▪ Community input incorporated from partners, CAC, and Board▪ Definition, goals, and metrics finalized▪ Changes made to programs and budgets as needed to meet goals	<ul style="list-style-type: none">▪ Engage all members of the Programs Team in this effort▪ Include Account Services to evaluate the role of rate structures as well

Additional Energy Program Actions

- Develop and Finalize a Worksheet Template for Community Engagement in Program Development
- Engage with Community Leaders and Community Based Organizations in the Early Stages of Public Facing Program Development
- Review Current Programs for Gaps & Inequities and Continuously Refine Programs to Better Align with Customer Needs
- Develop and implement PCE language and technology access policy for entire customer journey for PCE programs

Marketing and Account Services

Improve awareness, communication, and accessibility of PCE customer service, energy supply, and energy programs, especially among low-income and disadvantaged populations, and limited English proficiency groups.

Actions	Steps	Timeline	Lead	Metrics	Recommendations
Develop PCE Language and Technology Access Policy	<ul style="list-style-type: none">Survey other agencies' language and technology access policies for best practicesIdentify metrics used to quantify language and technology isolation across our service territory, if availableDraft/amend policy that incorporates best practices and addresses language and technology access needs of our customers	Q2 2023	Marketing and Community Relations	<ul style="list-style-type: none">Language and Technology access policy finalized, implementation started	<ul style="list-style-type: none">Circulate language and technology access policy to appropriate CBO partners/stakeholders to gather feedback prior to finalization

Additional Marketing and Account Services Actions

- Ensure that customer awareness surveys include and are reflective of PCE's diverse customer base
- Ensure PCE public website is accessible
- Develop a DEAI webpage
- Increase accessibility in public meetings
- Increase accessibility and diversity in outreach materials and customer notifications
- Ensure customer service representatives provide quality customer service in all PCE priority languages
- Ensure customer email inquiries in PCE priority languages receive accurate responses in same time frame as inquiries in English

Vendor and Energy Supplier Diversity

Ensure that the vendors and suppliers that do business with PCE are environmentally conscious and have equitable business practices. Establish a level playing field by creating opportunities and eliminating barriers to equal participation for all vendors.

Actions	Steps	Timeline	Lead	Metrics	Recommendations
Finalize and Adopt Recommended Revisions of PCE's Contracting Documents and Templates	<ul style="list-style-type: none">Review contracting documents and templates (Contracting Template, RFO, RFP, and Supplier Diversity Questionnaire) to identify potential bias and inequities in the languageReview and finalize GCAP suggested edits and updates to the contracting documents and templatesIntegrate DEAI principles and commitment into documents and templates	Q2 2023	Account Services	<ul style="list-style-type: none">Revised documents published and available to PCE employees engaged in procurement activitiesAll contracting documents and templates have DEAI commitment	<ul style="list-style-type: none">Review and update these documents on a regular basis to keep current with legislative and regulatory requirementsNotify Primes of commitment to DEAI

Additional Supplier Diversity Actions

- Finalize and Adopt the Recommendations in the Legislation & Regulatory Analysis Report (See Appendix E)
- Finalize and Adopt Recommended Revisions of PCE's Contracting Documents and Templates
- Add Qualitative Questions to RFO Template for Utility Scale Procurements Regarding Environmental Stewardship, Disadvantaged Community Outreach, Workforce Development, Responsible Procurement, and Supplier Diversity
- Adopt Supply Chain Code of Conduct
- Develop and Implement Diverse Subcontractor Reporting
- Develop Outreach Materials on How to do Business with PCE and a GO 156 FAQ document
- Increase Visibility of Solicitations Webpage
- Conduct Supplier Diversity Training for All Staff
- Encourage Vendors/Suppliers to Practice Equity
- Measure customer satisfaction with customer service provided by vendors

Monitoring and Evaluation

Action Plan Execution

- Execute and initiate the activities within the DEAI Action Plan and monitor progress.

Team Collaboration

- Collaborate between teams for input and feedback on specific tasks.

Adjust the Work

- If gaps in the monitoring and evaluation process are identified, make adjustments and improvements as necessary.

Annual Review

- Conduct annual reviews to revisit and identify PCE priorities.

Appendices

A. Gap Analysis

- Areas of focus identified through internal and external stakeholder surveys last summer
- Results reviewed with this committee previously

B. DEAI Glossary

C. DEAI Metrics Dashboard Example

D. DEAI Training Plan

E. Legislation and Regulatory Analysis

- Review of related laws and regulations that support or inhibit PCE's DEAI implementation

F. Monthly Diverse Subcontractor Paid Report Summary and Payment Verification

Training Plan Recommendations

- DEAI Basics
 - *4-hour training with outside facilitator, October 2022*
 - *Will be offered periodically to new staff as well*
- Inclusive Leadership
- Cultural Competency
- How to Be an Ally
- Inclusive One-to-One Meetings
- Inclusive Hiring
- Mitigating Unconscious Bias in Performance Reviews
- How to Crawl, Walk, and Run with Diversity Data
- Creating and Leading Mentoring Circles



The October 2022 all-staff retreat focused on DEAI training

Next Steps

- Board approval
- Implementation
- Evaluation and improvement