



# MEMORANDUM

EUGENE WATER & ELECTRIC BOARD

*Rely on us.*

TO: Commissioners Helgeson, Brown, Mital, Simpson, and Carlson  
FROM: Erin Erben, Chief Customer Officer; Monica Shovlin, Communications, Marketing & Research Supervisor; and Jennifer Connors, Communications Specialist  
DATE: May 26, 2017  
SUBJECT: Community Investment Report for Q1 2017  
OBJECTIVE: Information Only

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## **Issue**

The Board requested that management provide a quarterly report of donations, sponsorships and grants made under EWEB's Community Investment Program. Guidelines are in place to ensure consistency and transparency for how we invest our customers' dollars for the betterment and well-being of the community we serve. The attached spreadsheet lists sponsorships, donations, grants, event participation and other contributions for Q1 2017, categorized by interest area and type of giving.

## **Background**

EWEB's Community Investment Program includes mandated investments, fundraising activities, employee volunteerism, community service projects, events, sponsorships and donations. The vast majority of EWEB giving is either mandated (by our charter, FERC license agreements, etc.) or Board-directed (Education Grants, Limited Income Program, etc.). A small annual budget is allocated for "discretionary" giving. Community requests are vetted against EWEB's Investment Priorities to ensure donations align with the utility's mission and goals. Investment Priorities are: (1) People, (2) Economic and Workforce Development, and (3) Environment.

The Community Investment Strategy aims to achieve the greatest possible value to the community within the resources authorized by the Board through the annual budgeting process.

## **Discussion**

In March 2017, General Manager Frank Lawson directed staff to put a hold on all discretionary giving, pending guidance from the Board and a new strategic plan.

## **Recommendation/Requested Board Action**

None at this time. This information is provided for informational purposes only.

## Community Investment Q1 2017

Agency	Event/Description	Payment date	Event date	Amount	Investment area	Category	Notes/Metrics/Results
St. Vincent de Paul	Egan Warming Centers	1/17	N/A	\$3,000	PEOPLE: Safety Net	Discretionary	28 activations so far in 2017 (compared to 12 in 2016) Appreciation from Paul Neville, Director SvDP: “EWEB’s gift helped churches keep their doors open and shelter spaces warm during a long, cold winter. We were able to shelter a record number of men and women and, no doubt, save lives in process.”
St. Vincent de Paul	Diaper & Coat Drive/First Place Family Center	1/17	2016	\$2,000	PEOPLE: Safety Net	Discretionary	2016 request, paid in 2017 Appreciation from Terry McDonald, executive director SvDP: “We are grateful to EWEB for its donation and matching funds challenge. Many of us take necessities like coats and diapers for granted, but EWEB’s gift – and the gifts of those SVDP donors who provided matching funds – will be greatly appreciated by the families at First Place who often struggle to buy such items.”
Blacks in Government	Black History Month Dinner - Table sponsorship	1/17	2/17	\$600	PEOPLE: Diversity/Equity	Discretionary	EWEB attendance = 2 EES + 1 Commissioner
Community Supported Shelters	General Fund assistance	1/17	N/A	\$2,500	PEOPLE: Safety Net	Discretionary	Provide 1 month bus pass + replace lost state ID card and birth cert for 13 people
N/A (David Schrock)	Donation to family of deceased lineman	1/17	N/A	\$1,000	PEOPLE: Safety Net	Discretionary	Approved by GM and paid from GM budget
Eugene, Springfield, Bethel and McKenzie School Districts	½ annual grant payments	1/17	N/A	\$196,000	ECONOMIC/WKFC DEVLOPMNT: Education	Board Directed	
Zonta Eugene/Spqfld	Donation annual lunch	2/17	2/17	\$200	PEOPLE: Diversity/Equity	Discretionary	8 EWEB employees attended
Bags of Love	Donation	2/17	N/A	\$1,000	PEOPLE: Safety Net	Discretionary	EWEB donated \$1,000 (enough to provide bags to 5-6 children) plus an employee donation drive collected 115 pounds of “love”
NAACP	2017 Freedom Fund	2/17	3/17	\$750	PEOPLE: Diversity/Equity	Discretionary	EWEB attendance = 2 EES + 1 Comm
Encircle Films	UPRIVER film screening	2/17	4/17	\$300	ENVIRONMENT: Water Quality/ Reliability	Discretionary	From event organizer: “The event was extremely successful. We had a sell-out crowd of 118 attendees. The discussion was warm and

Agency	Event/Description	Payment date	Event date	Amount	Investment area	Category	Notes/Metrics/Results
							informative and people were very interested in what the panel members had to say. EWEB was highly praised for their Willamette River conservation efforts.”
Local Food Connect	Annual event	2/17	3/17	\$4,000	ENVIRONMENT: Water Quality/ Reliability	Discretionary	185 farmers, buyers and distributors attended
South Eugene HS	Robotics Challenge	2/17	4/17	\$1,000	ECONOMIC/WKFC DEVELOPMENT: Education	Discretionary	
4J School District	Solar Challenge	2/17	6/17	\$19,655	ECONOMIC/WKFC DEVELOPMENT: Education	Discretionary	TBD
Willamette High School	Electrathon Blast	2/17	3/17	\$1,000	ECONOMIC/WKFC DEVELOPMENT: Education	Discretionary	Social media reached 1,539 people
Shelter Care	50% of costs to repair HVAC system	3/17	N/A	\$3,677	PEOPLE: Safety Net	Discretionary	Contributed from Energy Efficiency Incentives
Eugene Marathon	2016 Sustainable water bottles	3/17	2016	\$3,000	ENVIRONMENT: Water Quality/ Reliability	Discretionary	2016 request, paid in 2017. 5,400 participants received EWEB branded water-bottles
Eugene Marathon	2017 Sustainable water bottles	3/17	5/17	\$1,500	ENVIRONMENT: Water Quality/ Reliability	Discretionary	Awaiting donation report
McKenzie River Trust	McKenzie Memories	3/17	4/17	\$2,500	ENVIRONMENT: Water Quality/ Reliability	Discretionary	
McKenzie River Trust	Living River Celebration	3/17	6/17	\$4,500	ENVIRONMENT: Water Quality/ Reliability	Discretionary	TBD
BRING Recycling	Sponsorship of BRING Home & Garden Tour	3/17	9/17	\$6,168	ENVIRONMENT: Energy Efficiency/ Renewable	Discretionary	TBD
<b>Q1 TOTAL</b>				<b>\$254,350</b>			

## Upcoming and/or committed

Agency	Event/description	Payment date	Event date	Amount	Investment area	Category	Notes/Metrics/Results
Willamette High School	Requested two wood poles to line shot-put area	N/A	4/17	N/A	ECONOMIC/WKFC DEVELOPMNT: Education	Discretionary	Electric Operations donated used poles
Butte to Butte	Sponsorship	N/A	7/17	N/A	ENVIRONMENT: Water Quality/Reliability	Discretionary	Water stations
Run to Stay Warm	Platinum (Presenting) sponsorship	TBD	11/17	\$5,000	PEOPLE: Safety Net	Discretionary	
Eugene, Springfield, Bethel and McKenzie School Districts	½ annual grant payments	7/17	N/A	\$196,000	ECONOMIC/WKFC DEVELOPMNT: Education	Board Directed	
Lane Community College	Annual grant payment	7/17	N/A	\$70,000	ECONOMIC/WKFC DEVELOPMNT: Education	Board Directed	
City of Eugene General Fund	CILT	TBD	N/A	TBD	REQUIRED	Mandated	(2016 = \$12.6 million)
City of Springfield	CILT	TBD	N/A	TBD	REQUIRED	Mandated	(2016 = \$591K)
American Red Cross	Donation from sale of emergency water containers	TBD	N/A	TBD	PEOPLE: Emergency Preparedness	Discretionary	(2016 = \$32K)
McKenzie Watershed Council	Donation	9/17	N/A	\$18,000	ENVIRONMENT: Water Quality/Reliability	Discretionary	
McKenzie River Trust	Homewaters Campaign (Finn Rock)	TBD	N/A	\$500,000	ENVIRONMENT: Water Quality/Reliability	Board Directed	
EWEB Limited Income Weatherization Services	Limited Income Weatherization Services	Ongoing	N/A	\$835,000	REQUIRED	Mandated	
EWEB Limited Income Bill Assistance	Limited Income Bill Assistance	Ongoing	N/A	\$1.5 M	PEOPLE: Safety Net	Board Directed	

## Requests on-hold pending direction from GM/Board

1. Habitat for Humanity: Request for \$5,000 house-building sponsorship
2. Catholic Community Services: Request for \$250 sponsorship of annual fundraising breakfast