



Market Development Initiative Evaluation

FIRST ASSESSMENT REPORT

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MDI Staff

- Leidos
- Resource Innovations
- Walker-Miller Energy Services (Walker-Miller)
- SEEL
- National Energy Foundation

CBO Partners

- Springfield Urban League Jobs Board and Outreach and Education
- Springfield Branch - National Association for the Advancement of Colored People
- BCMW Community Services
- Crosswalk Community Action
- Embarras River Basin Agency
- Two Rivers Regional Council of Public Officials
- Empowerment Center Decatur
- Senior Services Plus Handyman

EE Channel Partners

- CMC Energy Services (Diverse business)
- Future Energy Enterprises (Diverse business)
- National Energy Foundation (Diverse nonprofit)
- Power Take-Off
- Staples Energy
- Energy Sciences
- GDS Associates
- CMC Energy Services (Diverse business)
- Willdan, Inc.
- AM Conservation Group

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Sincerely,

Iyomakha Douglas

Iyomakha Douglas

CEO

iyomakha@thejpigroup.com

Contents

1	Executive Summary	5
1.1	COMMUNITY BASED ORGANIZATIONS PROGRAM STRATEGIES	7
1.2	DIVERSE VENDOR PROCUREMENT PROGRAM	10
2	Introduction	13
2.1	BACKGROUND ON THE MARKET DEVELOPMENT INITIATIVE	13
2.2	RESEARCH OBJECTIVES	14
3	Methods	15
3.1	MDI STAFF INTERVIEWS	15
3.2	INITIATIVE TRACKING DATA AND MATERIALS REVIEW	15
3.3	CBO PARTNER INTERVIEWS	16
3.4	EE CHANNEL PARTNER INTERVIEWS	17
3.5	SECOND ASSESSMENT PLANS	18
4	Detailed Findings	19
4.1	CBO PARTNERSHIP FINDINGS	19
4.2	DVPP FINDINGS	29
5	Conclusions and Recommendations	37
5.1	CBO PARTNERSHIP STRATEGIES	37
5.2	DIVERSE VENDOR PROCUREMENT PROGRAM	38
5.3	CONCLUSION	40
	Appendix A. Data Collection Instruments	42

Tables and Figures

Table 1. MDI Staff Interviewed	15
Table 2. CBO Partners Interviewed	16
Table 3. EE Channel Partners Interviewed	17
Table 4. CBO Partnerships KPIs and Achievements (Jan. 2021 through Dec. 2023)	20
Table 5. Customer Engagement Types for CBO Partnership Channel (2021 through June 2023)	21
Table 6. Ways CBO Representatives Described their Engagement Tracking	28
Table 7. Customer Groups in Need of Additional Support	29
Table 8. Diverse Vendor Procurement KPIs and Achievements (Jan. 2021 through Dec. 2023)	30
Figure 1. Diverse Vendor Procurement Spending Categories (Jan. 2021 through June 2023)	31
Table 9. Products or Services Purchased from Diverse Vendors (n=10)	33

1 Executive Summary

This report summarizes the results and recommendations from the evaluation of the Ameren Illinois Company (AIC) Market Development Initiative (MDI) completed by The JPI Group and Opinion Dynamics. The evaluation study is divided into two assessments. The first assessment, the topic of this report, occurred in 2023 and covered MDI activities from 2021 through mid-2023. We plan to conduct a second assessment in 2024 and 2025.

AIC launched the MDI in 2018 to promote new economic and energy efficiency opportunities for local and diverse individuals and businesses. The three core goals of the MDI are to (1) increase participation in AIC energy efficiency (EE) offerings among those who have never participated; (2) support local and diverse candidates for energy efficiency jobs; and (3) grow and expand local and diverse businesses. The MDI contains three channels: Community Based Organizations (CBO) Partnership Strategies, Diverse Vendor Procurement Program (DVPP), and Workforce Development. This assessment of the MDI focuses on two channels, CBO Partnerships and DVPP, although some findings and recommendations are relevant to the Workforce Development Channel.

The overarching goals of the evaluation are to determine how the MDI is performing against its key performance indicators (KPIs); provide recommendations for expanding or refining those KPIs; identify ways to improve MDI activities to drive impact, improve implementation, and further innovate at the nexus of energy efficiency and diversity, equity, and inclusion; and identify opportunities for AIC to better demonstrate the accomplishments of the MDI, both internally and externally.

To achieve these objectives, we assessed the following areas for both Channels:

- Performance against current KPIs.
- Data tracking practices and implementation processes.
- Marketing, education, and outreach strategies.
- Alignment with industry best practices.
- Performance from the perspective of MDI staff, AIC Energy Efficiency Program Implementation Partners (henceforth, “EE Channel Partners”), and CBO Partners.

Given AIC’s pioneering status as the first utility to implement an MDI program, we recognize the inherent challenges in directly benchmarking efforts against other utility programs. This unique positioning stresses the innovative approach to foster diversity and inclusion within operations and partnerships. Because there are no direct comparisons with existing programs, we must take care in fully capturing the breadth and depth of the program’s influence and accurately reflect its pioneering contributions to Illinois, the utility sector and the energy industry as a whole. This work sets a precedent for future initiatives; therefore, it necessitates a nuanced understanding of its impact and achievements.



Since 2018, MDI has funded 121 community-based organizations, engaged over 350,000 customers, provided 121 scholarships at seven community colleges, funded 78 internships and spent over \$109,000,000 with diverse-owned businesses. The program experienced tremendous growth, purposely expanding its partnerships, enhancing community outreach efforts, and fostering a robust supplier diversity support system, demonstrating commitment to creating significant and impactful connections.

The JPI Group and Opinion Dynamics conducted a thorough review of MDI tracking data and a range of supportive materials, including detailed implementation plans, comprehensive progress reports, extensive databases, and insightful reports. To gain a deeper understanding of the partnerships, programs and performance, we conducted interviews with MDI staff from the five contracted partner organizations. We facilitated eight in-depth interviews with Community-Based Organization (CBO) partners and conducted ten informative interviews with Energy Efficiency (EE) Channel partners.

We will present performance data and our analysis that identifies areas where the MDI excels, pinpoints opportunities for enhancement, and provides data-driven recommendations emphasizing actionable feedback for future direction. Our insights will have a legacy impact on under-resourced communities, support organizations and diverse businesses.

1.1 COMMUNITY BASED ORGANIZATIONS PROGRAM STRATEGIES

Strengths

The MDI's CBO partnership strategies have demonstrated numerous strengths across various areas. The MDI has successfully expanded the number and types of partnerships to 21 total, indicating a proactive approach to engaging with a diverse range of community organizations and customers. Noteworthy is that partnership spend grew significantly from nearly \$450,000 in 2021 to nearly \$850,000 in 2023. The results highlighted satisfactory levels of communication and support by Resource Innovations, which signifies there is effective collaboration and mutual understanding. These partnerships have been meticulously developed from the ground up, offering flexibility in alignment with the capacity of CBOs. Unlike conventional vendor relationships, this approach enables them to concentrate on targeted empowerment communities, ensuring they are reached effectively and according to their needs. These partnerships have successfully built a bridge of trust within Low and Moderate Income (LMI) communities, underscoring the importance of community-based collaboration in fostering positive relationships and outcomes. CBOs effectively connect with customers and link them to valuable resources, indicating alignment with the objectives of the MDI. CBOs surpassed their goals and are undertaking additional initiatives beyond the scope of their contractual obligations to fully assist the customers.

Another highlight is that CBOs have access to non-restrictive grants which have been utilized to increase the capacity of the programs. Also, this partnership fosters trust and goodwill within the community and enhances AIC's public image and amplifies positive impact by showing dedication to social responsibility and community engagement. It was found that several CBOs engage in activities that bolster the MDI workforce development channel, including job postings and minority contractor trainings. Marketing collateral effectively showcases the successes in a professional and attractive manner, highlighting the diversity of the program, and it contributes to the storytelling of successful engagement with diverse communities. Several CBOs are engaging in direct in-person marketing efforts. This collaborative effort results in advantageous outcomes for AIC, the CBOs and the communities they serve.

Overall, the study shows that AIC has consistently and greatly exceeded the majority of Key Performance Indicators (KPIs) throughout the duration of the program including number of customers engaged, number of events, number of appointments/meetings, and number of energy kits/products distributed. Throughout 2021 and 2022, the achievements significantly surpassed the annual goals, and the trend for 2023 indicates a trajectory poised to exceed the annual goal once again. AIC surpassed all key performance indicators that we received available data for. Refer to Table 4 CBO Partnerships KPIs and Achievements (January 2021 through June 2023).

The assessment further examined the volume and types of customer engagements facilitated by CBOs and their achievements. Current CBO metrics align with best practices for measurement. From 2021 to Q2 of 2023, the total number of customer engagements is 255,548. Notably, approximately two-thirds of customer engagements were classified as indirect, (social media and email campaigns) with the remaining one-third categorized as direct interactions (individual and small group). See Table 5. Customer Engagement Types for CBO Partnership Channel (2021 through June 2023).

Opportunities For Improvement

The CBO partner strategy faces several challenges that impact the effectiveness of outreach and engagement efforts. While there are opportunities to enhance customer engagement metrics, limited staffing levels due to hiring difficulty and high turnover rates within CBOs is a barrier to continuity and progress. Furthermore, CBOs are requesting training on outreach, engagement, metrics, tracking, and reporting to improve their effectiveness in these areas. Moreover, there are opportunities to provide additional support to outreach specific customer segments, such as moderate-income/tier 2 customers, renters, seniors, Spanish-speaking customers, and undocumented workers. Supply chain challenges have also impacted the timely delivery of outreach materials, hindering or delaying outreach efforts. The current state of the program's digital presence has been described as cluttered and not user-friendly, hindering effective partner engagement. The use of dual databases has been identified as a point of friction among partners. Lastly, while there is an existing protocol in place to solicit success stories, there is an opportunity to extensively communicate the process to increase submissions and amplify program successes. Addressing these challenges will be essential to improving the overall effectiveness of the CBO partner strategy and maximizing its impact on the community.

Recommendations

- **Recommendation 1.** The study confirms AIC's CBO Partnership strategies should persist in broadening the diversity and quantity of its partnerships, maintain open communication throughout the channels, offer ongoing support, and keep providing linkages for customers with resources. It emphasizes the importance of continuously broadcasting achievements and maintaining a positive reputation among partners and the community. Furthermore, continue establishing goals and strive to meet and/or surpass them regarding the volume and types of customer engagements and the distribution of energy kits, products and materials.
- **Recommendation 2.** Transform the useful qualitative feedback and updates gathered from community partners, on a quarterly basis, into a few quantitative metrics that represent the health of the partnerships. Additionally, consider collecting anonymized partnership satisfaction scores (e.g., overall satisfaction, satisfaction related to specific support provided) from CBOs on a regular basis. For example, collect scalar (e.g., 0-10 scores) from CBOs regarding their overall satisfaction with their partnership with AIC, as well as some critical support services (e.g., marketing support, technological support, data tracking tools). Leverage these quantitative metrics in conjunction with the detailed qualitative feedback to first quickly understand overall partnership health, then dive deeper to identify potential drivers of partnership health and priorities for strengthening partnerships.
- **Recommendation 3.** Consider making additions to external quarterly progress reports and stakeholder presentations. State clearly the significant amount of funding being provided through the Channel, which will demonstrate AIC's commitment to its partners and local communities. Additionally, include a table or other graphic in external reporting that clearly communicates the mixture of customer engagement occurring (e.g., indirect, direct, and community events); and clearly define the categories of customer engagement presented.
- **Recommendation 4.** Investigate ways to connect CBOs with affordable software that acts as a Customer Relationship Management (CRM) system. Such a system would allow them to track customers as they come in, the programs they refer the customers to, and how long it has been since they have met with the customer.

- **Recommendation 5.** Investigate ways for the EE Programs to capture information that would allow the identification of a CBO referral. One way this could happen is to include a question on a program application that asks how they learned of the program and an explicit instruction to include a CBO name. Quarterly or annual reports could be generated to estimate the number of referrals each CBO made, to which programs, and the percentage who successfully participate in the EE program.
- **Recommendation 6.** Using technology to track CBO referrals to other programs is beneficial because it allows for easier tracking of progress and outcomes; and data accuracy and reliability are enhanced. It allows for real-time tracking, customized reporting, data-driven decision making and improves efficiency. Streamlining the referral process reduces administrative burdens. Collaboration and communication will be enhanced, leading to stronger partnerships and coordinated efforts.
- **Recommendation 7.** Incorporate definitions of the metrics CBOs report into the PowerPath portal to ensure each is clear. Such definitions may also improve the accuracy of the reporting. We also suggest that Resource Innovations use regular check-in meetings with the CBOs to ensure the CBOs understand how the portal metrics align with the CBO's goals in their MOU.
- **Recommendation 8.** AIC should ensure CBOs have materials on EE programs and resources available to single family tenants so that customers without proof of homeownership can still access EE programs.
- **Recommendation 9.** Although support systems exist, there is a need for a more strategic approach to support advancement. Facilitate dialogue between AIC and the CBO partners, as well as amongst the CBOs (e.g., in a workshop), to share tips, tricks, and best practices around customer engagement. Specifically leverage the knowledge of those CBOs who do more direct engagement to inspire other CBOs with ideas for how they can adjust their own strategies. Through these conversations, AIC can identify the highest priority needs and develop training or support resources to address them. Some of the specific areas of support respondent CBOs mentioned included: advice on the best ways to explain to customers how they can save energy; techniques, tips, and tricks for engaging customers; and “any new ideas” that AIC may have for engagement opportunities. One CBO specifically wanted to know how they can streamline customer hand-offs between themselves and AIC.



1.2 DIVERSE VENDOR PROCUREMENT PROGRAM

Strengths

The Diverse Vendor Procurement Program exhibits several key strengths that have contributed to its success. Firstly, the program has achieved substantial growth in its database, now encompassing a little more than 400 diverse vendors, which underscores its expanding reach and inclusivity. Efforts resulted in exceeding the goals for the vendors in the database. From 2021 through June 2023, Leidos and various EE Channel partners have spent over \$7 million on vendor services in the database. AIC has consistently surpassed its diverse spending goals year after year. Furthermore, EE program implementers not only recognize the existence of the database but also understand its significant value, indicating effective programming. The program's coordinator, Walker-Miller Energy Services (Walker-Miller), plays a crucial role in maintaining this success by consistently facilitating high quality quarterly meetings and ensuring open lines of communication, fostering a collaborative and transparent environment. Additionally, Walker-Miller employs a multi-faceted approach to identify new vendors, demonstrating adaptability and a proactive stance towards diversification. The ease with which EE Channel partners can report their spend reflects the program's efficient and user-friendly reporting systems, further enhancing its operational effectiveness. The Diverse Vendor Procurement Program effectively supports AIC's broader goals, and it demonstrates a great return on investment.

Opportunities For Improvement

The Diverse Vendor Procurement Program (DVPP) has seen notable engagement and financial investment from EE In Channel Partners. Approximately one-quarter of the diverse vendors listed in the database (95 out of 400) were utilized between 2021 and June 2023, resulting in a cumulative spend of over \$7 million. Roughly two-thirds of the spending is concentrated among three vendors, highlighting a significant reliance on a few suppliers. Additionally, there is a considerable segment of the vendor pool, totaling 34 vendors, where the spending is less than \$1,000. This distribution of spending underscores the varying degrees of engagement and investment.

The DVPP faces several challenges that present opportunities for enhancement and refinement. An issue is the concentration of diverse spending primarily with three vendors. Additionally, there is an opportunity to introduce and refine KPIs to better measure and drive program success. KPIs are currently within the quarterly reports and they should be emphasized to narrate a more compelling story, both internally and externally. Furthermore, there is a disconnect between spending reports and the AIC quarterly reports and tracking data, suggesting an area for improvement in aligning and integrating reporting mechanisms. EE Channel Partners also encounter limitations due to restricted spending options stemming from a lack of decision-making authority, which constrains their ability to fully engage with diverse vendors. Moreover, challenges in procuring goods and services from diverse vendors include issues such as inconvenient procurement processes, vendors being located outside of the local area, higher prices, inability to meet specific needs, lack of certification as a diverse vendor, and vendors being outside of AIC territory. These challenges collectively signal opportunities for the DVPP to evolve its strategies and operations to support and expand diverse vendor engagement more effectively.

Recommendations

- **Recommendation 1.** It is strongly recommended that the Diverse Vendor Procurement Program persists in its current strategies due to their proven effectiveness in promoting inclusivity and economic growth among the supplier community. Central to its success is the continuous effort to identify new vendors, and support the cultivation of new businesses, thereby expanding the range of opportunities. Continue to support the existing vendors with resources to ensure their competitiveness and promote consistent growth to increase spend. Keeping open communication channels, facilitating regular meetings and sharing resources that bolster vendor capabilities and service quality is critical. Also, continue to ensure that the systems and reporting processes are easily accessible and user-friendly. It is imperative to continue these practices to maintain momentum and continue to increase spend.
- **Recommendation 2.** Track the percentage of vendors utilized from the Diverse Vendor Procurement Database and the distribution of diverse spending (as a percentage) across the vendors. Also consider tracking the percentage of spend with diverse vendors that are located inside Illinois and outside Illinois.
- **Recommendation 3.** Consider providing clearer documentation of DVPP's contribution to overall AIC diverse spending reporting in quarterly progress reports.
- **Recommendation 4.** Consider having Walker-Miller track outreach and pipeline metrics to measure the growth and retention of the diverse vendors. These metrics can include the number of new vendors identified as well as the number of new vendors that submit bids or proposals for procurement opportunities and how many diverse vendors have been maintained over time.
- **Recommendation 5.** Examine retention metrics for both job seekers and supplier diversity with a focus on continuous growth and capacity building. Implement a longitudinal tracking and analysis system to track the retention of job seekers and the growth in supplier diversity. This should include year-over-year comparisons to gauge progress and identify areas for improvement.
- **Recommendation 6.** Determine the essential skills required for organizational growth in the energy efficiency sector. Conduct a comprehensive skills assessment and create feedback and evaluation mechanisms to continuously refine and improve the program. Offer diverse suppliers opportunities for targeted support, training, mentorship and develop programs based on identified needs.
- **Recommendation 7.** Conduct a thorough analysis of conversion rates within the supplier diversity program focusing on the transition of suppliers from program enrollment to active participation in projects to evaluate whether suppliers who join the program are effectively becoming integrated into actual projects. Next step is to identify barriers to conversion and develop strategies for improvement.
- **Recommendation 8.** Measure program's impact on supplier growth. Examine how involvement in the program influences the growth and development of diverse suppliers by considering factors such as increased revenue, expanded business networks, enhanced capabilities and long-term business sustainability.
- **Recommendation 9.** Establish goals to increase the number of vendors in the database annually. These goals can be stratified by the types of products and services they offer or by their location in the state. Enhancing collaboration with the Workforce Development (WFD) Channel in areas lacking diverse business presence will pave the way for broader opportunities in diverse business development to meet specific needs. For the diverse vendors that have been identified, engage with them to assess their capabilities and look for ways to increase their capacity and bandwidth, or quicken the delivery of their products. Connecting the vendor with the Workforce Development Channel presents another positive outcome, as it allows them to explore potential training and support options they may be eligible for.

- **Recommendation 10.** Host a roundtable event where the EE Channel Partners can meet with each other and discuss their approaches and successes with diverse vendor spend.
- **Recommendation 11.** When Walker-Miller meets with the EE Channel Partners, they should include a standing agenda item that asks if the Channel Partner has identified any new diverse vendors. In this way, new vendors can be added to the database and shared with other Channel Partners.
- **Recommendation 12.** Develop a comprehensive publicly available resource compilation for focusing on crucial areas such as funding, technology, and marketing. This should involve aggregating free or low-cost resources to support growth and effectiveness.

The implementation of a comprehensive and holistic Market Development Initiative is vital to Ameren Illinois successfully achieving its mission. The goals of engaging new customers in under-served communities, supporting diverse businesses, and increasing jobs opportunities for diverse talent will enhance achievement through intentional and focused effort.

The CBO Program Strategies and DVPP are crucial for promoting diversity and inclusion within the EE sector, offering a strategic approach that values diversity and innovation. These programs play a key role in reaching diverse and under-served communities, breaking down barriers for underrepresented businesses, facilitating increased marketplace participation, and providing emerging businesses with access to larger networks and growth opportunities.

Our analysis highlighted several strengths, including strong relationships, effective communication, regular meetings and reporting, shared goals, and a commitment to the mission. To enhance these efforts, we advise adopting technology to streamline data collection and improve its accuracy and reliability. Further, refining Key Performance Indicators (KPIs), broadening partnerships, and securing additional funding will substantially increase the MDI's impact, thus elevating profitability, maximizing savings, and amplifying benefits.

Recommendations include leveraging technological systems and establishing processes to enhance data collection, tracking and reliability, coupled with the development and improvement of KPIs, partnership expansion, and funding and resource identification. The implementation of these recommendations will elevate the effectiveness of the Market Development Initiative, improving profitability, increasing savings and growing impact.

Expanding partnerships and engaging more Community-Based Organizations (CBOs) will enable Ameren Illinois (AIC) to extend its reach into rural areas, diversifying the customer base of AIC and strengthening an already robust program. This approach positions AIC to surpass its KPIs. Continued and increased investment in the MDI is vital for achieving high-quality results. This investment should cover additional program staff to provide the essential support needed for fruitful partnerships and program success. Moreover, increasing funding for agency roles will alleviate the administrative workload on CBO staff, leading to better technical skill, operational consistency, and reporting accuracy. Investing in a comprehensive database is also essential for the program's growth and scalability. These strategic investments are key to realizing the vision for MDI 2.0, laying a strong foundation for scalable achievements, improved program efficiency, and more effective engagement and support of communities and diverse suppliers.



2 Introduction

2.1 BACKGROUND ON THE MARKET DEVELOPMENT INITIATIVE

AIC launched the MDI in 2018 to promote new economic and energy efficiency opportunities for local and diverse individuals and businesses. The three core goals of the MDI are to (1) increase participation in AIC energy efficiency (EE) offerings among those who have never participated; (2) support local and diverse candidates for energy efficiency jobs; and (3) grow and expand local and diverse businesses.

The MDI includes three channels:

- **Community Based Organizations (CBO) Partnership Strategies.** The CBO Partnerships Channel fosters partnerships with CBOs to incorporate energy efficiency into their existing community-based programs and services. Resource Innovations supports CBOs by meeting regularly to set engagement goals and by coordinating distribution of marketing materials, outreach materials, and energy efficiency kits.
- **Diverse Vendor Procurement Program (DVPP).** The DVPP Channel facilitates an increase in diverse spend and builds connections between diverse vendors and Ameren Portfolio Partners. Walker-Miller Energy Services maintains a Diverse Vendor Procurement Database that allows partners to search for diverse vendors that meet their procurement needs. Walker-Miller also meets regularly with partners to set diverse spend goals and provide recommendations for procurement with diverse vendors in Ameren Illinois service territories.
- **Workforce Development.** The Workforce Development Channel focuses on connecting job seekers to employment opportunities and trainings that aid in filling employment gaps in the industry. The program, managed and implemented by SEEL, seeks to specifically support diverse job seekers in obtaining jobs with small, local and diverse vendors.

2.2 RESEARCH OBJECTIVES

This assessment of the MDI focuses on two channels, CBO Partnerships and DVPP, although, some findings and recommendations are relevant to the Workforce Development Channel. The overarching goals of the evaluation are to determine how the MDI is performing against its key performance indicators (KPIs); provide recommendations for expanding or refining those KPIs; identify ways to improve MDI activities to drive impact, improve implementation, and further innovate at the nexus of energy efficiency and diversity, equity, and inclusion; and identify opportunities for AIC to better demonstrate the accomplishments of the MDI, both internally and externally.

For CBO Partnerships, the research focused on how AIC can better support their current partners (and, through them, AIC customers); strengthen the engagement of current partners; and establish new partnerships that address critical gaps in MDI reach or services. Where possible, we leveraged and built upon the findings and recommendations from Opinion Dynamics' 2021 MDI Partnerships Study¹, which focused heavily on assessing CBO Partnerships data tracking.

For DVPP, the focus was to support AIC in creating an infrastructure of tools, resources, and mentors for the diverse vendors; growing the diverse spend in an equitable manner (e.g., number and types of roles); and improving data tracking to better demonstrate the Channel's accomplishments.

To achieve these objectives, we assessed the following areas for both Channels:

- Performance against current KPIs.
- Data tracking practices and implementation processes.
- Marketing, education, and outreach strategies.
- Alignment with industry best practices.
- Performance from the perspective of MDI staff, AIC Energy Efficiency Program Implementation Partners (henceforth, "EE Channel Partners"), and CBO Partners.

¹ <https://www.ilsag.info/wp-content/uploads/AIC-2021-MDI-Partnerships-Study-Findings-FINAL-2022-09-09.pdf>



3 Methods

This chapter summarizes the research activities included in the first assessment. The evaluation methods relied on a mix of primary and secondary data. All interview guides used in this evaluation are available in [Appendix A](#).

3.1 MDI STAFF INTERVIEWS

We conducted exploratory interviews with staff who implement the MDI on behalf of AIC. The purpose of these interviews was to better understand the partner’s role in the MDI, discuss data needs, and gather input on evaluation priorities. We interviewed staff at the five organizations shown in [Table 1](#). The interviews were approximately 30 minutes long and occurred in May and June 2023. We also spoke regularly with AIC staff overseeing the MDI.

Table 1. MDI Staff Interviewed

Organization	Role
Leidos	Manages integration of the MDI into overall AIC EE Program, including integration of MDI partners into Program offerings (e.g., supporting outreach strategy, growing partners to become vendors or Program Allies), tracking impact to portfolio from MDI activity (e.g., referrals), and development of Market Development Action Plans (MDAP) for each EE Channel Partner.
Resource Innovations	CBO Partnerships lead. Manages relationships with network of community-based partners, including holding the contract, tracking deliverables, providing technical assistance, and strategic planning.
Walker-Miller Energy Services (Walker-Miller)	DVPP lead. Facilitates diverse spend opportunities, tracks diverse spend, searches for and vets new potential vendors, and manages an online diverse vendor database for Channel partners.
SEEL	Workforce Development Channel lead. Facilitates job placement, wraparound services for jobseekers (e.g., sponsoring training, connecting folks to services to fulfill basic needs, removing barriers to obtaining or retaining employment), the internship program, the scholarship program, and the jobs board (available at IllinoisEnergyEfficiencyJobs.com).
National Energy Foundation	Supports the internship program by creating summer curriculum for participating interns; delivered in a format of six webinars per cohort.

3.2 INITIATIVE TRACKING DATA AND MATERIALS REVIEW

We reviewed all available MDI tracking data, supporting documentation, and other materials (e.g., marketing materials) related to CBO Partnerships and DVPP. The purpose of this review was to understand and assess the data tracking and collection methods; the KPIs used to measure performance; and marketing, education, and outreach strategies. We also explored alignment between data tracking and external reporting by AIC.

We reviewed the following data and materials in support of the evaluation:

- Implementation plans for each CBO (CBO Partnerships) and for Walker-Miller (DVPP).
- Publicly available AIC quarterly progress reports for 2021, 2022, and 2023 (Quarter 1 and Quarter 2), as well as a 2023 Illinois Stakeholder Advisory Group presentation by MDI staff.
- CBO Partnerships Channel tracking data, which included information such as partner budgets and payments; customer engagement activity; quarterly updates from CBOs; and energy efficiency kits distributed.
- The Diverse Vendor Procurement Database, which includes for each vendor, business name, common products and services they provide, their location, and relevant diversity information.
- The DVPP diverse vendor spend report spanning 2021 through mid-2023. This tracking data lists procurement of diverse vendors by AIC Channel Partners, which includes vendors used, Channel Partners that procured services, procurement date, dollar amount, and products and services.

3.3 CBO PARTNER INTERVIEWS

We conducted semi-structured in-depth interviews with staff at CBOs that participate in the MDI. The purpose of the interviews was to gather CBO feedback on the performance of the partnership (e.g., successes and challenges); perceived value and benefits to working with the MDI; ways to further support CBOs; and potential gaps in MDI reach or services.

AIC partnered with 19 CBOs in 2021—2023 in support of the MDI, according to data provided by Resource Innovations. We used a purposive sampling strategy for these interviews, aiming to collect diverse perspectives that represented the breadth of CBO experiences with the MDI. As such, our sampled CBOs represent a variety of activities, budget amounts, partnership tenures, and engagement goals. We ultimately conducted nine interviews with staff at the eight CBOs shown in [Table 2](#). The interviews were approximately 60 minutes long and occurred in July and August 2023.

Table 2. CBO Partners Interviewed

CBO Partner	Reason Selected
Springfield Urban League Jobs Board and Outreach and Education	Partnership work is broader than education and outreach; has a relatively larger budget.
Springfield Branch - National Association for the Advancement of Colored People	Not explicitly focused on low-income customers; small budget.
BCMw Community Services	Has in-house staff and is a high-value, long-term partner.
Crosswalk Community Action	Relatively new, partnership started in 2021.
Embarras River Basin Agency	Has the largest educational one-on-one meeting goal, at 1,000.
Two Rivers Regional Council of Public Officials	Newer partner with large customer engagement goal.
Empowerment Center Decatur	Has one of the newest partnerships, started in 2022.
Senior Services Plus Handyman	Big budget, long-time partnership.

3.4 EE CHANNEL PARTNER INTERVIEWS

We conducted semi-structured in-depth interviews with a sample of the EE Channel Partners that implement AIC’s Residential and Business EE Program offerings. The purpose of the interviews was to understand how EE Channel Partners approach diverse vendor procurement; track data and report to AIC on diverse vendor procurement; and any support, training, or resources that would strengthen their ability to utilize diverse vendors or identify spending opportunities.

DVPP engaged with 17 EE Channel Partners in 2021—2023, according to data provided by Walker-Miller. We used a purposive sampling strategy for these interviews, aiming to speak with Channel Partners who both have and have not used small and diverse vendors. Speaking with both types of partners will allow us to capture the experiences using a diverse vendor and potential barriers preventing it. We ultimately interviewed staff at the 10 Channel Partners shown in [Table 3](#). The interviews were approximately 60 minutes long and occurred in September and October 2023.

Table 3. EE Channel Partners Interviewed

EE Channel Partner	Ameren Illinois Initiative/Channel	Have Used a Diverse Vendor
CMC Energy Services (Diverse business)	Multifamily Initiatives	Yes
Future Energy Enterprises (Diverse business)	Mobile Homes & Air Sealing Channel	Yes
National Energy Foundation (Diverse nonprofit)	School Kits, High School Innovation	Yes
Power Take-Off	Business Retro-Commissioning	Yes
Staples Energy	Small Business Direct Install	Yes
Energy Sciences	Business Process Energy Advisors, Technical Review	Yes
GDS Associates	Business Energy Advisors	Yes
CMC Energy Services (Diverse business)	Business and Residential Midstream	No
Willdan, Inc.	Business Custom New Construction	No
AM Conservation Group	Business and Residential Online Marketplace	No



3.5 SECOND ASSESSMENT PLANS

After approximately a year passes (i.e., in late 2024), we will begin the second assessment of the MDI. During that year, AIC will have continued to gain experience implementing the MDI since its inception in 2018 and made significant progress towards its current KPIs; but also, may have significantly improved or changed the tactics that fundamentally alter the way the MDI should be assessed. The specific objectives, topics, and methods of the second assessment will be determined based on any new challenges or priorities that emerge. Broadly, the second assessment will revisit the same overarching topics, using some of the same methods, but will likely add larger-scale surveys with more CBOs and diverse vendors themselves. In the second stage, we will ask about how processes may have changed since completion of the first assessment, update the progress made against AIC established KPIs; and think about ways that the KPIs could be redefined. In performing the second assessment, we will incorporate key learnings and recommendations from the first assessment, as well as any new knowledge or developments in the industry or best practices.



4 Detailed Findings

This chapter provides relevant findings related to the research objectives, by channel.

4.1 CBO PARTNERSHIP FINDINGS

The CBO partnership findings draw on our review of program-related documents including the CBOs' implementation plans, progress reports, and channel tracking data as well as the nine interviews conducted with CBO staff.

Performance to Date

From 2021 through the middle of 2023, MDI funded 19 partnerships with CBOs². These partners included, for example, non-profit organizations that provide a wide variety of community services (e.g., senior services, crisis counseling); advocacy organizations; minority chambers of commerce; workforce development organizations; research centers; and community action agencies that implement the Illinois Home Weatherization Assistance Program and other state and federal programs. The number of CBO partners and partnership spending grew significantly during the evaluation period; from nearly \$450,000 in 2021 to nearly \$850,000 in 2023.

Table 4 below describes the KPIs that the MDI tracks for the CBO Partnerships Channel; goals and achievement for each year where available; and whether AIC includes information related to each KPI in external reporting (e.g., quarterly progress reports, stakeholder presentations). The implementation plan does not specifically list all these metrics as "KPIs," but the MDI implementation team does clearly use them to track progress. Further, while not listed in [Table 4](#), some CBOs also conduct activities that support the MDI Workforce Development Channel, such as job postings and minority contractor trainings.

² Not all partners have continued to be partners with the MDI. Two organizations were partners in 2022 but are no longer partners in 2023.

Table 4. CBO Partnerships KPIs and Achievements (Jan. 2021 through Dec. 2023)

Key Performance Indicator	Description of KPI	Year(s)	Annual Goal	Achieved	Incl. in External Reporting
Number of CBO Partners	Number of CBOs participating in CBO Partner Channel.	2023 (Annual)	N/A	21	Yes
CBO Partner Spend	Approved budgets and payments by AIC to CBO partners.	2021	N/A	\$448,664	No
		2022	\$820,224	\$468,636	No
		2023 (Annual)	\$847,954	\$760,379	No
Number of Customers Engaged	Number of customer direct and indirect engagements through a variety of outreach channels. (See table below.)	2021	25,500	105,838	Yes
		2022	65,120	118,300	No
		2023 (Q1-Q2)	64,850	31,410	Yes
Number of Events	Number of in-person and virtual events held.	2021	38	88	Yes
		2022	46	210	Yes
		2023 (Q1/Q2)	94	56	No
Number of Individual Appointments/1:1 Meetings	Number of private appointments and meetings.	2021	125	11,622	No
		2022	6,229	20,957	No
		2023 (Q1/Q2)	8,259	8,624	No
Number of Energy Kits/ Products Distributed	Number of energy-efficient kits or products distributed by CBOs to AIC customers.	2021	425	5,759	No
		2022	625	2,970	Yes
		2023 (Annual)	925	2,965	No
Number of Referrals	Number of customer referrals to AIC EE Programs.	2023 (Annual)	385	739	No
Number of Customers Engaged	Number of customer direct and indirect engagements through a variety of outreach Channels. (See Table 5)	2021	25,500	105,838	Yes
		2022	65,120	118,300	Yes
		2023 (Q1/Q2)	64,850	31,410	Yes

Source: CBO implementation plans, CBO Partnerships tracking data, external reports.

Customer engagement is the focus of most partnerships, and most CBOs are relying on digital marketing channels like social media and emails, rather than in-person engagements. [Table 5](#) summarizes the types of customers engagements conducted by CBOs. About two thirds (66%) of engagements are indirect (i.e., social media and email outreach), while direct (i.e., one-on-one or small group) and community event engagements represent the remaining third. Further, direct engagements are highly concentrated amongst a relatively small number of partners: three CBOs provided 63% of all direct engagements.

Table 5. Customer Engagement Types for CBO Partnership Channel (2021 through June 2023)

Types of Customer Engagements	Description	Year	Achieved	Percentage of Total Customer Engagements
Number of Indirect Engagements	Email/Newsletters, social media, and other.	2021	68,136	28%
		2022	76,085	31%
		2023 (Q1/Q2)	16,831	7%
Number of Direct Engagements	Focus groups individual appointments, and workshops.	2021	11,622	5%
		2022	21,446	9%
		2023 (Q1/Q2)	9,884	4%
Number of Event Engagements	Number of customers engaged at events.	2021	15,645	6%
		2022	20,484	8%
		2023 (Q1/Q2)	4,695	2%
Total			244,828	100%

Source: CBO implementation plans and tracking data. Note, this table excludes "Trainings" and "Workshops" that appeared targeted at contractors, not customers. These accounted for approximately 400 engagements.

Note: This analysis was completed prior to receiving additional data for the rest of 2023 (during the report finalization process).

KPI Assessment

Below are the key findings we identified from our assessment of the CBO Partnerships KPIs, tracking databases, and external reporting.

- Overall, Ameren is tracking a wide variety of useful metrics related to partnerships. These are largely focused on CBO's customer engagement activities. Beyond funding, there are no KPIs tracked related to AIC's support of partnerships or the health of those partnerships. The implementation team collects formal updates and feedback from each CBO each quarter, but that data is not transformed into KPIs that can be tracked and monitored over time.

- Customer engagement goals are set at the individual partnership level, not at the Channel level. Every year, each CBO develops an implementation plan that outlines their proposed projects and budget; a schedule of their proposed action steps; as well as their target goals for specific KPIs. The goals for each partnership do not always match up to their activities. For example, some partners distribute EE Kits, but do not have kit distribution goals. This highlights the flexibility to adapt to new opportunities within partnerships as they arise.
- External reporting provides only high-level information on customer engagement. In quarterly reports and stakeholder presentations, AIC often reports the total number of customer engagements achieved and qualitatively describes the types of engagements conducted. However, it is unclear based on these reports that, for example, most customer engagement is through indirect channels, such as social media; or that only a limited number of partners provide the lion's share of direct engagements.

Role of Resource Innovations

All interviewed CBOs were satisfied with their communication and contacts at Resource Innovations. Everyone we spoke with found Resource Innovations to be responsive and were able to get their questions answered. Two CBO representatives reported that the response times are not always as quick as they would like. But Resource Innovations has encouraged folks to always reach out or call anytime, so if a CBO representative is not getting an answer they need, they have no issues reaching back out and following up. To contrast, a different CBO representative said they often get a response from Resource Innovations within “a matter of minutes.”

Resource Innovations has recurring meetings with CBOs which allows Resource Innovations to check in on progress toward goals and offer support. These meetings include a progress-to-date check in on goals such as the EE Kit distribution and encouragement to distribute more. Resource Innovations will see what events the CBO has coming up and ask if they need more materials or anything for the event. And, finally, Resource Innovations also offers feedback on what the CBO has been working on since the last meeting, and may offer tips and tricks to reach more people³.

Value and Benefits of CBO Partnerships

The CBOs serve AIC customers who are predominantly low-income with high energy burdens living in rural, economically depressed areas. The interviewed CBO representatives described serving mostly white or mostly elderly customers, while two noted they help people of color including African American and Hispanic customers. Two also said they help families, women, and children while another noted veterans among those they assist. Interviewed staff also reported that a significant number of customers' homes are in need of weatherization improvements or are in disrepair. Additionally, many of the CBOs' customers were on the wrong side of the digital divide and lacked internet access, computers or smart phones, technical skills, or an email address. The lack of these resources prevents the customers from learning about programs available to them or applying for some programs that require an email address or only have applications online. We also heard that some do not have proof of homeownership, hampering their ability to use AIC's programs.

³ Only one CBO reported that Resource Innovations offers tips and tricks to reach more people. This CBO representative also requested additional training in this area, which we describe in the [Challenges and Desired Resources](#) section.

The CBOs excel at reaching customers and giving them the support they need. Several CBO staff described how the one-on-one support they provide to AIC customers leads to meaningful connections and referrals to money-saving programs. For example, below are two ways the CBOs described how they approach and engage with AIC's customers:

“A best practice is to participate, be present, and do things with them one-on-one. Don't just send the information. Send a person. Someone who has customer service skills and who can answer the questions and feel like they are part of the community.”

“Just talking to them, asking them about their situation. What are you going through? What are the struggles you are dealing with heating your home? Just talking to people and communicating is the key.”

When the CBOs are able to empower an individual to explain their situation, the staff can respond in a holistic way and try to identify the root causes of the issues. The CBOs can then share all relevant AIC programs for which the customer may qualify. The CBOs can also identify if specialized support is needed. For example, two CBO staff shared cases of when they provided seniors with EE kits and then they learned the seniors did not know how to install the showerheads or operate the smart thermostats and advanced power strips. The CBOs were able to send someone to the home to ensure the items got installed and the resident could realize the associated energy savings.

All interviewed CBO representatives said that the goals of the MDI align well with their organizations' goals. Their organizations seek to serve and assist disenfranchised community members, and the partnership with MDI allows them to provide energy-related resources and information to them.

AIC's partnerships with the CBOs provide benefits to the CBOs, AIC's customers, and AIC itself.

1. Engaging with MDI allows CBOs to expand their visibility to reach people that AIC may not be able to: CBO staff find ways to have a presence in the communities they serve. They usually go to sites where people already are, which include churches, libraries, back-to-school fairs, senior centers, and food banks. Two CBOs also put AIC information in villagers' water bills as a way to spread information. We also heard the giveaway items Ameren provides are attractive and well-liked. They draw customers in and allow the CBO staff to engage with the customer and offer appropriate advice. One explained how valuable the AIC giveaway items were to support their community engagement activities:

“Ameren sent me a bunch of earbuds. I took those and we were the most popular table at the event. Every class these kids sign up for requires them to have headphones. So that fits into why we are there, a part of the community, and these kids needed headphones. We had stapled an Ameren EE guide and our workforce development postcard and our community services flyer. We got calls from parents wanting to know about the workforce development program. It was a huge success. If I didn't have those headphones from Ameren, people might have walked by and grabbed a pen or pencil and just left.”

Another valuable support service is that CBOs can provide resources to overcome typical engagement barriers that AIC cannot always do. Examples staff gave included providing a translator and providing laptops people can use to sign up for programs. Also, customers can bring information for a program application to the CBO and the CBO staff will submit the electronic application on behalf of the customer.

2. The CBOs connect customers with valuable money-saving resources that will help them be self-sufficient: Staff we spoke with felt it was a point of pride to be helping low-income customers save money. One CBO staff person gave an example of how they connected a deaf couple with a program that gave them an efficient furnace at the beginning of winter. The EE Kits, behavioral information, and access to programs the CBOs provide that will lead to energy conservation are very important. They provide a pathway to help AIC customers save on their monthly energy bills allowing them to be more self-sufficient and not as dependent on energy assistance programs in the future. One interviewed staff member said how they feel when giving out information:

“There are some of those co-branded materials that just have good information; I can feel like I am handing you some tools to go home with. Hopefully, you will utilize one or two of these things and maybe it saves you [money]. If nothing else, maybe it makes your home more comfortable.”

3. CBO advocacy improves the image of Ameren for customers: When the CBOs are offering free EE kits and connections with programs, they speak positively of AIC. One CBO staff person described themselves as “just the middleman” and tells customers that these valuable resources are coming from AIC. For example, one interviewed staff person reported:

“We are telling our customers that we believe in Ameren. We are partnering with them. We believe this is a good thing for you.”

Another noted that AIC customers can have a negative view of Ameren after their power gets shut off, their rates go up, or when they owe a lot. So, this CBO staff person said they send the message that Ameren is not the “bad guy.” As they shared,

“I’ve told people that Ameren is not there to be against you. They are there to help you. They have a lot of programs, and they make a lot of funding available to help people, so you ought to take advantage of these programs.”

Altogether, the partnerships between AIC and the CBOs have myriad benefits and are helping AIC customers access information, programs, and equipment to help their homes be more comfortable and energy efficient.

Challenges and Desired Resources

The CBO representatives we spoke with wished they could reach more AIC customers and five said that limited staff restrict their ability to do more outreach. CBO interviewees said that it is hard to hire quality staff and to retain them. Some of these staff have multiple roles at the CBO and cannot dedicate their full time to the MDI partnership. Limited staff also makes it difficult to travel to all of the communities in the areas they serve, particularly getting to events held on weekends. One respondent that experienced turnover said half of their staff are new and they could benefit from training opportunities. At the same time, three CBO staff highlighted how they have been able to leverage the nonrestrictive grants provided by Ameren, which allowed them to retain staff to attend events, provide services, and fill in gaps where other funding has fallen short.

In 2023, the EE Kits took longer to receive than in years prior, which hampered their ability to do outreach and made some CBOs concerned they may not reach their goals. Four interviewed CBO staff reported this as a challenge they were confronting this year. Two of the CBOs said that it is related to the kit request form moving to a system called Amplify that is powered by Salesforce. Multiple people said that getting the kits takes longer than before, and this hampers their ability to do outreach. One CBO representative shared that the ten-day waiting period impacts their ability to meet their goals when they must wait on them. Another CBO representative noted that their staff have only one log-in to Amplify to request the EE Kits. Their solution was to have staff record a customer's information on paper, and then at the end of the day one person logs in and transfers all the information from the paper forms to the online forms.

Several CBO representatives reported issues with getting passwords re-set to access the Amplify Portal. The CBO staff said they first turn to their Resource Innovations contact when troubleshooting. But Resource Innovations reportedly does not manage the accounts, so they contact someone who can re-set the password. One CBO representative shared how the delayed access affects them:

“And then it’s a couple days later and we will say, hey we still haven’t heard and we have 150 kits we distributed that we need to record. And oftentimes it creates a lag in us being able to continue to do the work because we need to log all of that product that is used and out the door before we can get more product.”

Another CBO representative reported similar issues with their password. They said when they go through the process of re-setting their password, the email never comes even after checking their spam folder. They said, “It is still a nightmare. If we could get into the EA portal it would be great. But I can’t.”

Five CBOs desired training that would boost their ability to reach more AIC customers and others had ideas for resources that might expand their reach. We explain them below:

- **Training On Outreach And Community Engagement.** Five interviews of CBO staff said that they wanted formal training from AIC about how to do community engagement and improve communication. This included advice on the best ways to explain to customers how they can save energy, techniques, tips, and tricks for engaging customers, and “any new ideas” that AIC may have for engagement opportunities. One CBO specifically wanted to know how they can streamline communication between themselves, AIC, and customers.

- **More Materials.** A few CBOs said they received fewer promotional items in 2023. They have been able to get flyers, but fewer items like light bulbs, weather stripping, or winterized strips to cover outlets.
- **A List Of Customer Addresses.** One CBO requested a list of addresses of AIC customers so they could send them a mailer or postcard telling them that the CBO is a resource available to them and the services they offer. They thought this would be an effective way of reaching a large number of customers quickly but had not had success getting addresses from the post office.
- **Mass Media Outreach.** One CBO whose customers tend to not have internet access suggested that TV or radio ads could be a way of reaching those customers. They recognized that it may be expensive but thought AIC could justify it as a public service announcement.

Data Tracking and Reporting

This section reviews our findings about how CBOs track and report their activities and engagements, including through the Ally Portal which is maintained by Resource Innovations.

PowerPath Portal

Most CBOs found the PowerPath Portal easy to use, but two had challenges linking its metrics to metrics in their MOU. Six of the nine interviewees reported no issues with the PowerPath Portal. The CBO staff keep track of their social media posts, engagements, EE Kits distributed, as well as outreach events and attendees. Then, on a regular basis, they access the portal and enter the information (some do this weekly, others monthly). A few mentioned how they liked that it automatically keeps a running total for the year, which allows them to see how close they are to meeting their goals.

However, two CBO representatives we spoke with said that the metrics the portal asks them to report were not metrics they thought were in their Memorandum of Understanding (MOU)⁴. They said they could use more instruction on how the metrics in their MOU relate to the metrics in the portal. One suggested that the PowerPath portal should contain definitions of metrics. They shared:

“It says metric ID, and then it says metric, and then it says household participants. But what about the household participants? It doesn’t tell me what these household participants are. I’m looking for definitions. In addition, I need to be able to draw a line that goes from metric #1 to paragraph 23 of the MOU that says, your goal is 5,000 for social media postings. Maybe it was in a training I missed out on.”

⁴ A third CBO representative noted challenges with the Ally Portal. However, it seems their issue is more related to an internal CBO arrangement rather than the portal. They noted that they cannot delete data after entering it into the portal and have to get their project manager to delete it.

Referrals to Other Programs

CBO staff do not know if a customer they have referred to an AIC EE program ultimately participates in the program and, at the time of the interviews, had no way to report a referral to AIC. The CBO staff had no visibility into whether a customer follows through on a referral and applies to a program. Similarly, they do not know whether the customer ends up receiving the benefits of a program to which they have been referred. The only way they find out is if a customer comes back and mentions it or calls them to tell them. One CBO representative said they encourage the customers to follow-up and let them know what happened. One CBO representative thought that Resource Innovations could play the role of tracking whether a customer a CBO referred to a program applied to that program. If there was a line of communication or visibility to the program referrals, then the CBOs could report how many customers applied for programs and how many customers ultimately participated in the program because of the CBO referral.

Two CBO staff wish they had a more formal process for reporting success stories to AIC. When customers are able to access programs and resources, and get help they need, some call their representative at the CBO and let them know. These CBO representatives thought that having an established forum for documenting the good stories would help demonstrate the impact that they are making. Three different CBO representatives mentioned that they will put success stories and pictures on their social media pages, but AIC staff might not see those.


Reporting on Engagements

There is variability in how CBOs translate their engagements into the metrics they report. Some of the activities and methods are highly accurate and confidently represent a customer receiving AIC-related information. However, for some of the reported engagements, we cannot be sure that the customer saw the material, read it, or understood it. [Table 6](#) shows the range of activities and metrics CBO staff use to measure and report their engagements.





Table 6. Ways CBO Representatives Described their Engagement Tracking

Likelihood	Activity	Metric
Higher likelihood of customer receiving information 	<ul style="list-style-type: none"> • Online videos or digital press releases • Events hosted at CBO • Applications for HEIQ, LIHEAP, or weatherization programs • Any customer who comes in looking for help with their AIC bill 	<ul style="list-style-type: none"> • Video views, clicks on post • Track the number of registrants and the number who attended; sign-in sheets • Track the number of applications • Track number of customers/ appointments
	<ul style="list-style-type: none"> • Tabling at community events 	<ul style="list-style-type: none"> • “We do our best to keep a tally of the people that approach our table, that we give flyers to and the giveaways.”
	<ul style="list-style-type: none"> • Pamphlets distributed by hand at an event • Pamphlets mailed 	<ul style="list-style-type: none"> • Number of pamphlets in boxes • Number of bills with information
	Lower likelihood of customer receiving information	<ul style="list-style-type: none"> • Pamphlets put in food distribution boxes • Information put in village water bills

There are also outreach activities for which the CBOs are unable to learn the number of people reached. One CBO representative reported they put AIC program information on their website and have asked to get analytics of page views but has reportedly been told “there is no way to know” how many people have visited the webpage. Another noted that their customer service representatives have AIC information on their desks and are supposed to relay it to customers who come in for appointments. But the representative acknowledged that their staff do not offer that information to everyone, so she cannot know for certain the number of customers who got referrals to AIC programs.

New Partnership Opportunities

CBO staff identified a few customer groups that could benefit from additional outreach or support (Table 7). All seven CBO staff reported that a new CBO was not needed, but that with more funding and staff resources, their organization would be able to reach these groups.

Table 7. Customer Groups in Need of Additional Support

Customer Group	Number of CBOs (n=7)	Type of Support Needed
Moderate-income, Tier 2 customers	3	Identification of these customers and outreach to them about the specific programs they qualify for.
Renters	2	Outreach to landlords so they are more comfortable signing the forms to allow their rental properties to participate in programs. Or engagement with Housing Authorities.
Seniors	2	Information about program eligibility requirements because seniors do not always realize they qualify for these programs.
Spanish-speaking customers	1	The CBO that serves them could benefit from more translators or more Spanish-language materials
Undocumented customers	1	The CBO needs grants or funds that allow them to offer support to undocumented customers.

CBO staff are reaching all of the counties and zip codes they serve, but two reported that the tiny villages in rural areas are the hardest to reach. These CBO representatives thought that with more resources and staff, their organization would be able to bolster outreach in those areas.

4.2 DVPP FINDINGS

The findings below about AIC’s diverse spend come from our review of implementer spending with diverse vendors, provided by Walker-Miller and from our interviews with implementer representatives.

Performance to Date

From 2021 through mid-2023 Leidos and various EE Channel Partners have spent over \$7 million on services provided by vendors included in the Diverse Vendor Procurement Database.

Table 8 describes the KPIs that the MDI tracks for the DVPP; goals and achievement for each year, where available; and whether AIC includes information related to each KPI in external reporting (e.g., quarterly progress reports, stakeholder presentations). There are additional metrics not listed related to specific implementation milestones each year, such as creating the Diverse Vendor Procurement Database.

Table 8. Diverse Vendor Procurement KPIs and Achievements (Jan. 2021 through Dec. 2023)

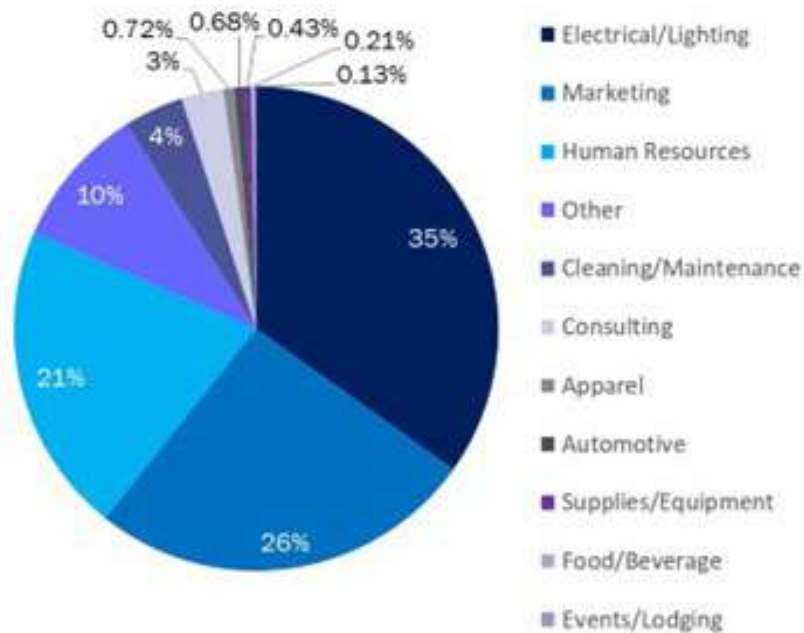
Key Performance Indicator	Description of KPI	Year	Goal	Achieved	Incl. in External Reporting
Dollars spent on diverse vendors	Payments to diverse vendors in the Diverse Vendor Procurement Database.	2021	\$750,000	\$4,335,845.92	No
		2022	\$2,500,000	\$2,945,373.22	No
		2023 (Annual)	\$2,000,000	\$1,933,068	No
Number of Diverse Vendors in Database	Number of Diverse Vendors available in the Diverse Vendor Procurement Database.	N/A	350*	406	No
					No
Host outreach events to educate Disadvantaged Business Enterprises (DBE) about EE procurement opportunities	Number of in-person and virtual outreach events held.	2022	5	5	No
Increase the pipeline of DBE bidders eligible to respond to EE Requests for Proposals (RFP)	Research conducted by Walker-Miller to identify, engage, vet, and provide a list of DBEs that have potential to competitively bid on RFPs.	2022	4	106	No
		2023 (Annual)	25	26	No
Educate DBEs about EE RFP & other procurement opportunities	Outreach Partner-hosted events facilitated by Walker-Miller to educate DBEs on Ameren Illinois' EE procurement process, RFPs, and other procurement opportunities.	2023 (Annual)	8	10	No
New DBEs Utilized	New DBEs utilized by Channel partners.	2023 (Annual)	15	38	No
Enrich DVP Database	Scrubbing of DBE entries in the database (verify DBE status, operational status, etc.)	2023 (Annual)	4	4	No

*This goal is based on the KPI “maintain a database of diverse businesses candidates” in the 2021 Walker-Miller implementation plan. Source: DVPP implementation plan, tracking data, and external reports.

There are over 400 diverse vendors in the database, 95 of which have been used by EE Channel Partners. Further, about two-thirds of spending is concentrated among three vendors who have won large contracts. The remainder of spending is typically much smaller. For example, there are 34 vendors with spending below one thousand dollars.

Figure 1 shows overall spending, by category. Spending is highly condensed (81%) in three spending categories. The “Electrical/Lighting” category consists of lighting upgrade services provided to EE Channel Partners. “Marketing” includes advertisements, design services, promotional products, business cards, printing, and other services. “Human Resources” includes recruiting and information technology (IT) support.

Figure 1. Diverse Vendor Procurement Spending Categories (Jan. 2021 through June 2023)



Source: DVPP tracking database. Percentages may not sum to 100% due to rounding.

Note: This analysis was completed prior to receiving additional data for the rest of 2023 (during the report finalization process).

KPI Assessment

Below are the key findings we identified from our assessment of the DVPP Channel KPIs, tracking databases, external reporting.

- There are a limited number of KPIs related to diverse vendor spending. The channel tracks overall spending and vendors used but does not track the percentage of vendors used from the Diverse Vendor Procurement Database, or distribution of spending across vendors.
- There is a disconnect between diverse spending reports in AIC quarterly reports and the DVPP tracking data. AIC reports a much larger diverse spending amount in quarterly progress reports, which includes all AIC EE Program diverse implementation contracting and Program Ally spending. For example, the goal for diverse spending in AIC’s 2023 quarterly report is listed as over \$17 million, whereas DVPP’s diverse spending goal is \$2 million. While DVPP is not the only source of AIC diverse spend, it is unclear in external reporting how DVPP contributes to that larger goal.

Role of Walker-Miller

Interview findings indicate that Walker-Miller has been instrumental in facilitating diverse spend among EE Channel Partners. Much of the diverse spending the interviewed EE Channel Partners have done was a result of Walker-Miller's support, which happens in a few ways:

- **The Online Diverse Vendor Database Maintained By Walker-Miller.** All but one EE Channel Partner we spoke with was aware of this online database and had used it in the past. Most EE Channel Partners reportedly start with this online database when they are seeking to identify a new vendor. Notably, the one EE Channel Partner who did not use this database reported, "Finding them in each territory, that's been a constant struggle for our guys and I don't know if they exist or not. That's been the challenge, is uncovering them."
- **Recurring Meetings.** EE Channel Partners meet with Walker-Miller on a quarterly basis to check in on their diverse spending to date, discuss EE Channel Partner spending needs and opportunities, and offer encouragement and support.
- **Ad Hoc Communication.** EE Channel Partners found their contacts at Walker-Miller to be responsive and available for ad hoc phone calls. As one EE Channel Partner described, "At times we'll just pick up the phone and call the Walker-Miller team and say, 'hey you know we're looking for apparel', as an example, and they set us up with a vendor that they've used. That's been very successful."
- **Walker-Miller Outreach.** Interviewees said that sometimes Walker-Miller will approach the EE Channel Partners and ask if they have considered certain diverse vendors for one of their spending needs. They said this does not happen as often as them approaching Walker-Miller. One EE Channel Partner reported this has happened twice in nine months.

Every EE Channel Partner we spoke with was satisfied with their communication with Walker-Miller and was able to get any questions answered in a timely manner. One EE Channel Partner reported that Walker-Miller has "provided really good service and has been very thorough in answering questions and providing guidance."

Diverse Procurement Opportunities and Limitations

EE Channel Partners have purchased a variety of products from diverse vendors for their own operations and for implementing AIC programs. Programs that conduct direct install activities or provide EE Kits have been able to find diverse vendors to supply items they need, such as LED lights, thermostats, and smoke alarms. Apparel was one of the items that Channel Partners more commonly noted they were able to get from a diverse vendor. [Table 9](#) lists some of the products and services that our interviewed EE Channel Partners had purchased from small or diverse vendors.

Table 9. Products or Services Purchased from Diverse Vendors (n=10)

Product or Service	Number of Interviewees
Apparel	3
Items in kits, or the kits themselves	3
Restaurants	2
Gas stations	2
Hotels	1
Consultants	1
Printing services	1
Bookkeeping/accountant	1
IT provider	1
Gift card provider	1
Specialized tools	1

At the same time, most EE Channel Partners we spoke with (8 of 10) felt they had very limited spending opportunities or felt they had little ability to decide on vendors. The EE Channel Partners who conducted online programs were the most limited in their purchasing opportunities. Any spend their firm does is controlled by their corporate office and that office decides the vendor for cleaning services, or office equipment. Two interviewees noted that when AIC hosts a conference, they will stay at the conference hotel instead of staying further away just to support the diverse spend. One of them hoped that AIC was considering diverse hotels, caterers, and audio/visual companies for symposiums it hosts or sponsors.

Diverse vendors do not always operate in a way that allows AIC’s EE Channel Partners to work with them. EE Channel Partners who have found diverse vendors for their spending opportunities noted several challenges to procuring goods or services from them. The diverse vendors they found were:

- **Not Always Convenient Or In The Locations They Work.** A staff person on the road may know about diverse-owned gas stations, but they may not be able to travel the distance to one and will have to choose a closer one. Two EE Channel Partners said that the Diverse Vendor Database does not have gas stations listed for the rural areas they drive in. A catering-related example was that large national chains provide online ordering systems, allowing someone to quickly and easily arrange for a delivery. The diverse catering vendor they found required a phone call to make the order and schedule the delivery, which was less convenient and more time-consuming for the EE Channel Partner.

- **Not Offering Cost-Competitive Products.** Three EE Channel Partners described situations where they found a diverse vendor offering products they needed, but at a significantly higher price. One EE Channel Partner gave an example of showerheads that were \$9 from the diverse vendor and only \$3 from a non-diverse vendor. We also heard a similar example related to LED lights.
- **Not Able To Get Them The Product In A Timely Manner.** Two EE Channel Partners described situations where they could not use a diverse vendor because the product was not available right away. One thermostat vendor an EE Channel Partner approached had no inventory at the time of the request. Another EE Channel Partner sought an infrared camera from a diverse vendor, who said it would take a month to be delivered. This EE Channel Partner chose to order it from an online marketplace and was able to receive it the next day.
- **Not Be Able To Meet The Specific Needs Of The EE Channel Partner.** One EE Channel Partner had found diverse vendors for their printing needs, but none of them could meet the volume of guides and pamphlets the EE Channel Partner required. In another case, the EE Channel Partner needed catering services at 7:00 a.m. for a breakfast meeting, and the diverse vendor they found did not offer services that early in the morning.
- **Not Usually In AIC Territory.** The three vendors with the largest AIC spend are all outside of AIC territory. EE Channel Partners are using diverse vendors based in Chicago, Indiana, Michigan, and other states.
- **Not Always Certified As Diverse.** One EE Channel Partner purchased goods from a diverse vendor, but that vendor was not certified as diverse, and so they cannot report that spend as part of the DVPP channel.

These examples reflect a situation where certified diverse vendors are known and they have the product the EE Channel Partner needs to buy, but there are other market barriers in the way. Given that two of three roadblocks have been surmounted, it points to an opportunity for AIC to bolster the vendors' ability to meet EE Channel Partner needs.

Diverse Vendor Database and Vendor Identification

The Diverse Vendor Database is a valuable resource for EE Channel Partners to identify diverse vendors. Since they rely on it so heavily, we heard from three EE Channel Partners that they want the database to grow. They want to see more types of products and services and more options for gas stations and hotels. When EE Channel Partners cannot find a suitable vendor in the database, one said, "We don't know where to look [for them]."

There are limitations to the Diverse Vendor Database, to the extent that three EE Channel Partners were in the process of developing their own lists⁵. One EE Channel Partner has joined an organization of women-owned businesses. They plan to attend events and network so they can meet other diverse-owned businesses. An interviewed EE Channel Partner who works with AIC Program Allies, approached the Allies they were already working with and asked if they were diverse. Some of them were and so they encouraged them to get certified. A significant limitation they noted, though, was that they bring their customers multiple Program Allies as options, and it the customer decides who they hire, so this EE Channel Partner cannot control whether a diverse Program Ally actually gets a project.

⁵ One of these three implementers with their own list is included in the three who wanted to see the database grow. In total, five of 10 interviewed implementers either explicitly requested an expanded database or began developing their own database.

Walker-Miller uses a multi-faceted approach to identifying diverse vendors. They use different databases available online and resources provided by organizations such as the Women's Business Enterprise National Council. If a vendor has identified a need, Walker-Miller staff may also perform Google searches or search on Facebook to find someone who can meet the need. They also ask people they know in different areas to see if they are aware of appropriate vendors in a location that Walker-Miller is not.

Interviewed Walker-Miller staff said there were a range of reactions after they approach a new vendor. Some are initially very excited and appreciated while others may be skeptical of the opportunity. Walker-Miller staff mentioned they had developed a "conversational process" where they explain to a potential vendor how the MDI is a chance to bring value and revenue to their business. Walker-Miller staff explain the diversity criteria for small and diverse businesses, and how AIC's EE Channel Partner organizations want to utilize their business. They reported success with this approach and how, after explaining those pieces, the vendors show "more openness and understanding" to the offer.

Data Tracking

EE Channel Partners found it easy to report their diverse spend using the monthly Diverse Spend Report that Walker-Miller provided⁶. Walker-Miller provides a monthly reporting template in Excel that the EE Channel Partners use to report their diverse spend. The EE Channel Partners keep track of any diverse spend, whether that is through marking receipts, flagging items in their accounting systems, or keeping a list in a spreadsheet. Then, one staff member compiles the information into the template and uploads it to a portal where Walker-Miller can access it. One interviewee commented on how it is much easier to report the spend than it is to find diverse vendors.

One interviewee desired greater communication and feedback around the data reporting process. They suggested that at the beginning of the year, Walker-Miller could clearly lay out the process and exactly each step that needs to be done so the EE Channel Partner can feel confident they checked all the boxes. They described their situation in the following way: "Now that we're more familiar with the process, we are more confident that we are doing everything we're supposed to do. But historically, that's been my concern. We submitted our logs, is there something else? Turns out no. We just weren't confident."

Three EE Channel Partners noted that the process may become more difficult if they had more diverse spend. Given that each had few vendors and few spending opportunities to report, they found it streamlined and simple. But they worried that it might get more complex or unwieldy if their diverse spend grew significantly.

⁶ Two interviewed implementers thought the report might be quarterly and could not remember for sure.



Additional Support Desired

AIC's EE Channel Partners did not feel they needed any formal training but desired a chance to connect with one another and hear how others were meeting their diverse spending goals. The EE Channel Partners all took their diverse spending goals seriously and intentionally sought out diverse vendors to the extent they could. They also sought to do more and expand their diverse spend. Half of the interviewees wanted to hear about how the other EE Channel Partners are approaching their diverse spend opportunities and which vendors they are using. One woman-owned business thought it would be valuable to connect with other woman-owned businesses. One interviewee shared their perspective on the value of connecting with other Ameren EE Channel Partners:

“That information sharing would be great among a group of our peers because there’s no threat to it, right? Maybe there’s a creative approach that they’re taking. Maybe it’s something we haven’t thought of. It’s not like we’re giving away trade secrets. It’s for the betterment. So, I think some of that knowledge sharing would be even better for all of us.”

If three EE Channel Partners are developing their own lists of diverse vendors, such a meeting may be a place where they can share what they’ve found with the other EE Channel Partners and with Walker-Miller. Convening the AIC EE Channel Partners would afford another opportunity to use diverse vendors for a meeting space, food and beverage, or printed materials.

5 Conclusions and Recommendations

We offer the following conclusions and recommendations for each MDI Channel in this study.

5.1 CBO PARTNERSHIP STRATEGIES

Conclusion. AIC tracks a variety of useful information and metrics on CBO partnerships and CBO customer engagement and workforce development activities of the CBOs, generally in line with industry best practices. The partnerships also allow for an appropriate amount of flexibility, allowing partners to use AIC funds to conduct activities that were not originally planned as opportunities arise. There are, however, some opportunities to improve data tracking, performance monitoring, and external storytelling.

- **Recommendation.** Transform the qualitative feedback and updates gathered from community partners, on a quarterly basis, into a few quantitative metrics that represent the health of the partnerships. Additionally, consider collecting anonymized partnership satisfaction scores (e.g., overall satisfaction, satisfaction related to specific support provided) from CBOs on a regular basis. For example, collect scalar (e.g., 0-10 scores) from CBOs regarding their overall satisfaction with their partnership with AIC, as well as some critical support services (e.g., marketing support, technological support, data tracking tools). Leverage these quantitative metrics in conjunction with the detailed qualitative feedback to first quickly understand overall partnership health, then dive deeper to identify potential drivers of partnership health and priorities for strengthening partnerships.
- **Recommendation.** Consider making additions to external quarterly progress reports and stakeholder presentations. State clearly the significant amount of funding being provided through the Channel, which will demonstrate AIC's commitment to its partners and local communities. Additionally, include a table or other graphic in external reporting that clearly communicates the mixture of customer engagement occurring (e.g., indirect, direct, and community events); and clearly define the categories of customer engagement presented.

Conclusion. The CBOs are valuable because they can reach customers that AIC does not, yet the CBOs cannot know if the customer follows through on their referrals to AIC EE programs. This gap in their knowledge limits their ability to know how effective they are and their successes. It also prevents them from following up with customers who did not act on the program referral. Once tracking of program referrals is established, then goals could be set to increase those referrals.

- **Recommendation.** Investigate ways to connect CBOs with affordable software that acts as a Customer Relationship Management (CRM) system. Such a system would allow them to track customers as they come in, the programs they refer the customers to, and how long it has been since they have met with the customer.
- **Recommendation.** Investigate ways for the EE Programs to capture information that would allow the identification of a CBO referral. One way this could happen is to include a question on a program application that asks how they learned of the program and an explicit instruction to include a CBO name. Quarterly or annual reports could be generated to estimate the number of referrals each CBO made, to which programs, and the percent who successfully participate in the EE program.

- **Recommendation.** Using technology to track CBO referrals to other programs is beneficial because it allows for easier tracking of progress and outcomes; and data accuracy and reliability are enhanced. It allows for real-time tracking, customized reporting, data-driven decision making and improves efficiency. Streamlining the referral process reduces administrative burdens. Collaboration and communication will be enhanced, leading to stronger partnerships and coordinated efforts. CBOs were largely satisfied with the PowerPath Portal; however, some were unclear on the portal metrics or how they tied to their contracts.
- **Recommendation.** Incorporate definitions of the metrics CBOs report into the PowerPath portal to ensure each is clear. Such definitions may also improve the accuracy of the reporting. We also suggest that Resource Innovations use regular check-in meetings with the CBOs to ensure the CBOs understand how the portal metrics align with the CBO's goals in their MOU.
- **Recommendation.** AIC should ensure CBOs have materials on EE programs and resources available to single family tenants so that customers without proof of homeownership can still access EE programs.

Conclusion. Customer engagement is a core goal of most CBO partnerships. Many CBO partners tend to rely on digital marketing channels, like social media and email, rather than in-person. This is to be expected, as digital marketing is likely cheaper and less time-consuming for a CBO; but these strategies may not be as effective, or memorable, as in-person engagements. In this vein, five interviewed CBO staff said that they wanted formal training from AIC about how to do community engagement and improve communication. Taken together, these two findings highlight a potential opportunity to better support partners in enhancing their promotion of the MDI and their own services.

- **Recommendation.** Facilitate dialogue between AIC and the CBO partners, as well as amongst the CBOs (e.g., in a workshop), to share tips, tricks, and best practices around customer engagement. Specifically leverage the knowledge of those CBOs who do more direct engagement to inspire other CBOs with ideas for how they can adjust their own strategies. Through these conversations, AIC can identify the highest priority needs and develop training or support resources to address them. Some of the specific areas of support respondent CBOs mentioned included: advice on the best ways to explain to customers how they can save energy; techniques, tips, and tricks for engaging customers; and “any new ideas” that AIC may have for engagement opportunities. One CBO specifically wanted to know how they can streamline customer hand-offs between themselves and AIC.

5.2 DIVERSE VENDOR PROCUREMENT PROGRAM

Conclusion. DVPP tracks detailed information related to the diverse spending of EE channel partners and provides reasonable clarity related to the types of services provided by diverse vendors. However, external reporting in AIC quarterly progress reports obscures the contributions of DVPP to AIC's overall diverse spending. Further, there is evidence that diverse vendor procurement amongst EE channel partners is not equitably distributed. Rather, three vendors represent over three-quarters of spending. In addition, there are a number of gaps in the tracking data that prevent assessment of achievements against specific KPIs listed in the DVPP implementation plan. There is also opportunity to add new metrics that can illustrate the activity and progress of the DVPP channel.

- **Recommendation.** Track the percentage of vendors utilized from the Diverse Vendor Procurement Database and the distribution of diverse spending (as a percentage) across the vendors. Also consider tracking the percent of spend with diverse vendors that are located inside Illinois and outside Illinois.
- **Recommendation.** Consider providing clearer documentation of DVPP's contribution to overall AIC diverse spending reporting in quarterly progress reports.
- **Recommendation.** Consider having Walker-Miller track outreach and pipeline metrics to measure the growth and retention of the diverse vendors. These metrics can include the number of new vendors identified as well as the number of new vendors that submit bids or proposals for procurement opportunities and how many diverse vendors have been maintained over time.
- **Recommendation.** Examine retention metrics for both job seekers and supplier diversity with a focus on continuous growth and capacity building. Implement a longitudinal tracking and analysis system to track the retention of job seekers and the growth in supplier diversity. This should include year-over-year comparisons to gauge progress and identify areas for improvement.
- **Recommendation.** Determine the essential skills required for organizational growth in the energy efficiency sector. Conduct a comprehensive skills assessment and create feedback and evaluation mechanisms to continuously refine and improve the program. Offer diverse suppliers opportunities for targeted support, training, mentorship and develop programs based on identified needs.
- **Recommendation.** Conduct a thorough analysis of conversion rates within the supplier diversity program focusing on the transition of suppliers from program enrollment to active participation in projects to evaluate whether suppliers who join the program are effectively becoming integrated into actual projects. Next step is to identify barriers to conversion and develop strategies for improvement.
- **Recommendation.** Measure program's impact on supplier growth. Examine how involvement in the program influences the growth and development of diverse suppliers by considering factors such as increased revenue, expanded business networks, enhanced capabilities and long-term business sustainability.

Conclusion. Barriers to greater spending with diverse vendors among AIC's EE Channel Partners is threefold: 1) An existence problem (a diverse vendor that offers what is needed does not exist); 2) an identification problem (finding a vendor who offers what is needed), and 3) an ability to use them problem (the diverse vendor operates in a way that makes them difficult to use). AIC and its support organizations may be able to address the second and third barrier, while the first would be more difficult.

- **Recommendation.** Assess the accuracy and completeness of the Diverse Vendor Database to identify the services and geographic areas with the fewest vendors.
- **Recommendation.** Establish goals to increase the number of vendors in the database annually. These goals can be stratified by the types of products and services they offer or by their location in the state.
- **Recommendation.** For the diverse vendors that have been identified, engage with them to assess their capabilities and look for ways to increase their capacity and bandwidth, or quicken the delivery of their products. One way to do this is connecting the vendor with the Workforce Development Channel to see what training and support they may qualify for.

- **Recommendation.** Host a roundtable event where the EE Channel Partners can meet with each other and discuss their approaches and successes with diverse vendor spend.
- **Recommendation.** When Walker-Miller meets with the EE Channel Partners, they should include a standing agenda item that asks if the Channel Partner has identified any new diverse vendors. In this way, new vendors can be added to the database and shared with other Channel Partners.
- **Recommendation.** Develop a comprehensive resource compilation for focusing on crucial areas such as funding, technology, and marketing. This should involve aggregating free or low-cost resources to support growth and effectiveness.

5.3 CONCLUSION

As a progressive industry leader committed to being intentional about diversity, equity and inclusion, Ameren Illinois engaged The JPI Group to assess the MDI. The implementation of a comprehensive MDI is vital to successfully achieving energy efficiency savings goals for under resourced communities, preparing diverse talent for career pathways in the sector and increasing capabilities, opportunities, and profitability for diverse businesses. Our data analysis has identified several strengths, such as robust relationships, open communication channels, consistent meetings and reporting, aligned goals, and a mission-driven approach. To further improve, we recommend leveraging technological systems and creating processes to improve data collection, tracking, and reliability. Additionally, developing and refining KPIs, expanding partnerships, and identifying funding and resources will significantly enhance the MDI's effectiveness, thereby boosting profitability, increasing savings, and amplifying its overall impact.

In conclusion, expanding partnerships and increasing CBOs will aid AIC in reaching out to the rural communities, further diversifying AIC's customer base. This will improve upon an already strong program and propel AIC to exceed all KPIs. Sustained and augmented investment is essential to fully realize the potential of advancing the MDI, thereby ensuring superior quality outcomes. Such an investment would allow for additional program staff, providing the necessary hands-on, attentive support critical for fostering successful partnerships and ensuring program effectiveness. Moreover, allocating more funds for agency positions would significantly reduce the administrative burden associated with CBO staffing, leading to greater technical proficiency, consistency in operations and enhanced reporting accuracy. Investing in a robust database is another critical area that would enable the programs to grow and scale effectively. These strategic investments are not merely expenditures but pivotal action points for the envisioned MDI 2.0, setting a solid foundation for scalable success, enhanced program efficiency, and more impactful community and diverse supplier engagement and support.



Project Team



Paul Douglas
President, The JPI Group



Kendra Lee
Workforce Development Director, The JPI Group



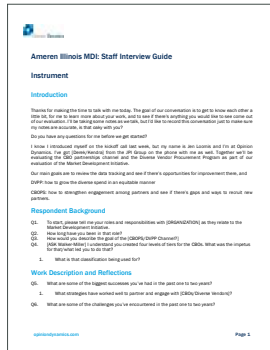
Alan Elliott
Director, Opinion Dynamics



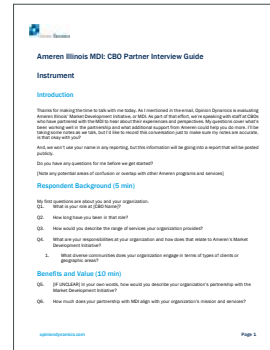
Dr. Jennifer Loomis
Principal Consultant, Opinion Dynamics

Appendix A. Data Collection Instruments

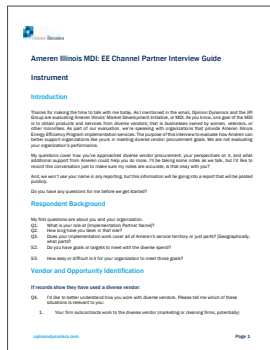
Access the interview guide corresponding to each thumbnail by clicking the respective hyperlink located below it.



[MDI Staff Interview Guide](#)



[CBO Partner Interview Guide](#)



[EE Channel Partner Interview Guide](#)

Contact



Kendra Lee
Workforce Development Director
The JPI Group
609.200.6921
kendral@thejpi.com



Paul Douglas
President
The JPI Group
267.688.9606
paul@thejpi.com

