

**Illinois Energy Efficiency Stakeholder Advisory Group  
Large Group Meeting:  
Joint with Income Qualified EE Advisory Committee  
Thursday, October 1, 2020  
12:00 – 4:30 pm  
Zoom Teleconference Meeting**

**Attendee List and Meeting Notes**

**Meeting Materials – Thursday, October 1 Meeting**

- Meeting Page: [Thursday, October 1 Meeting](#)
- [Thursday, October 1 SAG Agenda](#)
- Equity Hiring Panel: Barriers and Solutions in the EE Workforce
  - [Introduction to Equity Hiring Panel](#)
  - [Equity Hiring and Workforce Development Meeting Discussion Questions](#)
- Utility Updates
  - [ComEd Equity Hiring and Workforce Development Update Presentation](#)
  - [Ameren Illinois Workforce Development and Equity Presentation](#)
- [Growing and Diversifying the Energy Efficiency Workforce: Pandemic Edition \(Smart Energy Design Assistance Center – SEDAC\)](#)
- Additional Document Provided for Reference: [Illinois Equity and Workforce Development Resources](#)

**Meeting Attendees**

Celia Johnson, SAG Facilitator  
Samarth Medakkar, Midwest Energy Efficiency Alliance (MEEA) – Meeting Support  
Abigail Miner, IL Attorney General's Office  
Aimee Gendusa-English, Citizens Utility Board  
Akosua Goosby, Elevate Energy  
Amalia Hicks, Cadmus Group  
Amber Anderson, Walker-Miller Energy Services  
Amir Haghghat, CLEAResult  
Amy Jewel, Elevate Energy  
Andrew Rains, IL Association of Community Action Agencies (IACAA)  
Andrey Gribovich, DNV-GL  
Angela Holloway, Ameren Illinois  
Angie Ostaszewski, Ameren Illinois  
Angie Ziech-Malek, CLEAResult  
Anna Connelly, MEEA  
Annette Beitel, Future Energy Enterprises  
Anthony Santarelli, Smart Energy Design Assistance Center (SEDAC)  
Arvind Singh, DNV-GL  
Ashley Palladino, Resource Innovations  
Beatrice Quach, Resource Innovations  
Booker Vance, Elevate Energy  
Brady Bedeker, ComEd  
Brett Bridgeland, Slipstream  
Briana Parker, Elevate Energy  
Bridget Williams, Guidehouse  
Bruce Montgomery, Energy Solutions LLC  
Carla Walker-Miller, Walker-Miller Energy Services  
Catherine Mrase, ComEd  
Chanda Rowan, Nicor Gas  
Cheryl Johnson, People for Community Recovery  
Cheryl Scott, Metropolitan Mayors Caucus  
Christina Pagnusat, Peoples Gas & North Shore Gas

Chris Vaughn, Nicor Gas  
Chung Saenz, Kendall Grundy Community Action  
Cliff Haefke, Energy Resources Center, UIC  
Cory Foster, ComEd  
Dalitso Sulamoyo, Champaign County Regional Planning Commission  
Daniel Moring, Slipstream  
Danielle Cooper, Claretian Associates  
Dantawn Nicholson, ComEd  
Dave Hernandez, ComEd  
David Whittle, Leidos  
Dawn Thorpe, Skill Demand  
Deb Dynako, Slipstream  
Debra Hereford, Springfield Housing Authority  
Debra Perry, Ameren Illinois  
Delmar Gillus, Elevate Energy  
Diamond Jackson, NAACP  
Dion Warr, L3 Events  
Ed Horton, Sangamon County Department of Resources  
Elba Aranda, National Latino Education Institute  
Ellen Steiner, Opinion Dynamics  
Emma Weaver, EMI Consulting  
Erika Dominick, Walker Miller Energy Services  
Greg Ehrendreich, MEEA  
Gregory Norris, Aces 4 Youth  
Haley Keegan, Resource Innovations  
Hanh Pham, Willdan Energy Solutions  
Hannah Howard, Opinion Dynamics  
Harsh Thakkar, Franklin Energy  
Holly Spears, SEEL  
Jackie Nagel, Nicor Gas  
Jacob Stoll, ComEd  
James Gariepy, Leidos  
James Heffron, Franklin Energy  
Janice Boman, Embertec  
Jason Fegley, Ameren Illinois  
Jean Ascoli, ComEd  
Jean Gibson, Peoples Gas & North Shore Gas  
Jeffrey Hurley, Blue Green Alliance  
Jen Rhodes, MEEA  
Jenille Reid, L3 Events  
Jennifer Alvarado, Franklin Energy  
Jennifer Morris, ICC Staff  
Jenny George, Leidos  
Jim Jerozal, Nicor Gas  
John Pady, CEDA  
Jordan Berman-Cutler, ComEd  
Julie Hollensbe, ComEd  
K.C. Doyle, ComEd  
Kalee Whitehouse, VEIC  
Karen Lusso, National Consumer Law Center  
Katherine Elmore, Community Investment Corp.  
Katherine Johnston, Green Homes Illinois  
Kathia Benitez, Franklin Energy  
Kelly Mulder, ILLUME Advising  
Kierra Riser, Walker-Miller Energy Services  
Kimberly Loewen, Elevate Energy  
Kristen Pratt Kalaman, Resource Innovations  
Kristol Simms, Ameren Illinois  
Lalita Kalita, ComEd  
Lance Escue, Ameren Illinois  
Larry Dawson, IACAA  
Larvetta Loftin, L3 Events

Laura Goldberg, Natural Resources Defense Council (NRDC)  
Leanna McKeon, Chicago Housing Authority  
Leanne DeMar, Nicor Gas  
Lilli Garza, MEEA  
Linda Larsen, SEDAC  
Lisa Miranda, Rebuilding Together Chicago  
Lorelei Obermeyer, CLEAResult  
Lori Shupe, Indoor Climate Research & Training (U of Illinois)  
Lydia Davenport, Illinois Valley Economic Development Corp.  
Mallory Audo, Ameren Illinois  
Maria Onesto Moran, Green Home Experts  
Mark DeMonte, Whitt-Sturtevant, on behalf of Ameren IL  
Mark Sebree, Franklin Energy  
Mark Szczygiel, Nicor Gas  
Marsha Belcher, Community Action Partnership of Lake County  
Mary Johnson, Resource Innovations  
Matt Armstrong, Ameren Illinois  
Melvin Nicks, Peoples Gas  
Michael Frischmann, Ecometric Consulting  
Michael Pittman, Ameren Illinois  
Mike Butkus, ComEd  
Mike King, Nicor Gas  
Molly Lunn, ComEd  
Monique Leonard, Ameren Illinois  
Naomi Davis, Blacks in Green  
Natalie Fortman, Opinion Dynamics  
Nicholas Crowder, Ameren Illinois  
Nick Dreher, MEEA  
Nick Horras, CEDA  
Norris Watson, PCCEO  
Omayra Garcia, Peoples Gas & North Shore Gas  
Patricia Plympton, Guidehouse  
Patrick Sullivan, SEDAC  
Paulette Hamlin, Western Egyptian Community Action Agency  
Ramandeep Singh, ICF  
Randy Gunn, Guidehouse  
Reine Rambert, MEEA  
Rob Neumann, Guidehouse  
Salina Colon, CEDA  
Samantha Stahl, Ameren Illinois  
Scott Fotre, CMC Energy  
Scott Yee, Resource Innovations  
Selena Worster Walde, Erthe Energy Solutions  
Sharon Lewis, Meadows Eastside Community Resource Organization  
Shonda Biddle, Walker-Miller Energy Services  
Stacey Paradis, MEEA  
Stacy Gloss, Indoor Climate Research & Training (U of Illinois)  
Stephanie Robinson, Ameren Illinois  
Steve Klemm, Leidos  
Sue Castleman, BCMW Community Services  
Tamika Cole, Walker-Miller Energy Services  
Ted Weaver, First Tracks Consulting, on behalf of Nicor Gas  
Teresa Haley, Illinois NAACP  
Theresa Collins, Senior Services Plus  
Thomas Drea, Leidos  
Timothy Melloch, Future Energy Enterprises  
Tina Williamson, Elevate Energy  
Tisha Burnside, Resource Innovations  
Victoria Nielsen, Applied Energy Group  
Vincent Gutierrez, ComEd  
William Davis, Bronzeville Community Development Partnership  
Wm Lenny Hamende, Sangamon County Weatherization

Yami Newell, Elevate Energy  
Yesenia Diaz, Franklin Energy  
Yvette Pittman, Peoples Gas & North Shore Gas  
Zenía Montero Chang, ICF

## **Meeting Notes**

Follow-up is indicated **in red** within the notes.

## **Opening & Introductions**

*Celia Johnson, SAG Facilitator; Jean Ascoli, ComEd, IQ North Advisory Committee Facilitator; and Annette Beitel, Future Energy Enterprises, IQ South Advisory Committee Facilitator*

Meeting purpose:

1. To hold a panel discussion on equity hiring barriers and solutions.
2. To educate participants on utility workforce development updates and EE-specific metrics and goals on diversity and equity hiring.
3. To educate participants on Smart Energy Design Assistance Center (SEDAC) workforce development research.
4. To hold a brainstorming discussion on how Illinois utility EE portfolios can further support equity hiring and workforce development in the 2022-2025 EE Plans

## **Equity Hiring Panel Discussion: Barriers and Solutions in the EE Workforce**

### ***Panelists:***

- Delmar Gillus, COO, Elevate Energy
- Holly Spears, Account and Clients Relations Manager, Business Development, SEEL
- Carla Walker-Miller, Founder and CEO, Walker Miller Energy Services
- Nick Dreher, Policy Director, Midwest Energy Efficiency Alliance

### **Panelist Question 1 – Defining Equity Hiring: What does equity hiring mean to you? How does your company or organization define equity hiring or diverse hiring?**

Delmar Gillus: To Elevate, looking at communities we serve and making sure that everyone in the community has access to the jobs and opportunity. We started to see that the folks doing the work did not look like the customer they were serving. Diaspora of community members have access to the jobs created through the clean energy economy.

Holly Spears: For us, diversity and equity are two separate things. Diversity is adding people of color to this industry. Equity is leveling the playing field to give them the tools. Training into the positions. Tuition reimbursement. They should leave able to compete with others in this industry.

Carla Walker-Miller: Walker-Miller (WM) has been on a mission to help diversify the EE industry. Being intentional about inviting into the industry. This currently occurs by natural selection, but there is no one directing POC (people of color) into this industry. There is an infrastructure that exists that provides an easy on-ramp that doesn't exist for people of color. We have to create this ecosystem.

**Panelist Question 2 – Business Goals: Does your company or organization have equity or diversity business goals or targets? If so, please explain.**

Carla Walker-Miller: In Michigan, WM wanted a diverse team. We are Detroit-based, the region is a melting pot. We have to recruit differently. If we place an ad in traditional journals, we will by far get white male applicants. We have to cultivate organic channels to cultivate diversity. Look at the demographics of the area. Our work is regional, so we are careful in identifying what the demographics are in a service territory. We try to reflect the demographics of the area we are serving.

Delmar Gillus: Big believer in what we do and how we do it. We focus on the communities we serve and support, then recruit in those channels. Often times, job postings are posted on sites that under-represented communities don't visit. We have been successful in recruiting talented individuals in these communities. We have a diversity team that is working to find and develop black and brown contractors. We are trying to align our own programs and utility portfolios with this goal. Our team focuses on this so that they develop the next generation of contractors, exposing them to some of the opportunities.

Holly Spears: Our model is designed to start with the least represented individuals. It's automatic for us, so we target diverse candidates out the door. We are sourcing local contractors, minority contractors that they can help or develop. It is our natural hiring model.

**Panelist Question 3 – Barriers: What are 2-3 barriers that currently exist in equity hiring or diverse hiring from an implementation contractor perspective, either with utilities or within other key players in the EE industry?**

Delmar Gillus: There needs to be a conversation around the jobs side of this. Often, we'll talk about training, contractor development, but one of the biggest barriers is ultimately need access to the jobs and opportunities. One of the biggest barriers and what we have focused on is to have a clear understanding of what partnerships or jobs are available. So training and development is more intentional. Get them into the process of the development and training for these jobs. Much like food deserts, we have job and opportunity deserts. One of the big ways is to partner with community-based organizations, like Blacks in Green. Access to capital. Are there ways of infusing capital so diverse businesses have access to working capital and to start of their businesses? In partnership with community organizations, you can start to build community based economic engines to exploit these opportunities and address these barriers.

Carla Walker-Miller: The number one barrier is that utilities have not required or demanded it. Contractors reflect utilities, and the number one barrier is that utilities haven't made this a requirement. The teams themselves are mostly white males. These are lucrative programs with so many metrics, yet we've never been required to measure the diversity of their teams. As soon as it becomes a condition, like a requirement for savings and spend and satisfaction, then we can address these barriers.

Holly Spears: Sometimes the hiring policies are strict and rigid. We had a candidate on one of our teams who had a non-violent conviction. Should not have disqualified this person for doing the work. We were unable to onboard them because of something they did as a teenager. Some of those general hiring policies are a great barrier. It would be great for the utilities to take a look at some of those policies. Going back 15 years is unrealistic.

#### **Panelist Question 4 – Solutions: What are potential solutions to overcome existing barriers?**

Holly Spears: We adhere to utility rules. Those rules could use an amendment. Things have changed since they were established. In regard to hiring. Our competitors or prime contractors are able to pay wages greater than we can. Not everyone had the opportunity to go to college. Some got certifications on the job or through lesser known certifications. The hiring requisites and policies need to be looked at and amended.

Carla Walker-Miller: Once implementation contractors understand how important diversity and inclusion is, that removes 90% of the barriers. Can spend more time and money recruiting from different communities. With larger companies, back offices are in native cities. Natural inclination is to do everything in the area headquartered, but efforts and hiring need to be done locally according to the work being done in the utility service territory. These contracts are lucrative enough to accomplish this. Companies can take more time and be intentional about who they are hiring. Most of the jobs are field jobs, and they are hiring people who can learn on the job. The barrier is they do not consider recruiting in these communities. Recruiting a more diverse group of customers being served. If you stand the teams up so they are more diverse, customers become more diverse. Vendors become more diverse. Every utility wants their programs to benefit ratepayers, so more intentional thoughts and policies are needed. Local diverse ecosystem is not a significant barrier as long as the industry decides it's important.

Delmar Gillus: Utilities should look at these issues with a longer-time horizon. A lot of these programs are built on the expectations the utilities have. Look at what are the structures around programs and what are the time horizons. We have to be careful that metrics the POC get the less lucrative opportunities while the larger less diverse organizations get the more lucrative contracts. Hiring within underrepresented communities ultimately opens opportunities.

*Question (Mark Sebree): In regards to access to capital, what is the most legitimate avenue without jeopardizing their business?*

- Delmar Gillus: One thing that the IL Jobs coalition has been working on in context of CEJA is addressing this need. With everyone in the state paying into these programs, they are looking to create a grant fund that will give seed capital to black, brown and women owned businesses. Because of systemic racism, even though there are requirements, like 40% diverse, a lot of the diverse businesses are not able to grow and build their businesses because of lack of access to capital. Proposing through CEJA a grant fund to help them with working capital and position them to take advantage of the funding. They are also looking at ideas around Green Banking. Loan programs that are forgivable or at cost, similar function to infusing capital. For a lot of historical or business growth challenges, they haven't had the same access to capital historically. So they're looking to level the playing field through those financial actions.

Carla Walker-Miller: It's important to identify local and diverse businesses in the areas where the utilities are. The money spent in some communities is some of the highest investment made in those communities. There needs to be intention about building within these communities. Companies go to janitorial, but there are many companies that do anything you are looking for – branding, marketing IT, etc. Investment does not necessarily mean money, can even mean understanding what they need, time and cultivation. A mistake can be made without losing their opportunity.

Delmar Gillus: There are a lot of businesses out there if given the opportunity and right support, they could go to the next level. Not looking at a program year perspective but rather a long-term horizon. If partnered with mentors, they could be a business that could handle these larger projects. They are also based in our communities.

Carla Walker-Miller: One contract we have is to diversify Ameren IL's supplier portfolio. Our job is to introduce vendors across the portfolio so they have access to each implementation contractor in the portfolio.

*Question (Karen Lusson): Can you briefly speak to the challenge of non-profits not being eligible for diverse business status?*

- Delmar Gillus: There are a significant number of black and brown run nonprofits in the state that can take advantage of the diverse business benefits. Advocating that these orgs can be recognized as diverse. It's going to give access to new projects and programs. Ties them with the opportunity's utilities have to support diverse businesses and ultimately address the job deserts.

### **Panelist Question 5 – Business Opportunities: How can the EE industry further support equity hiring and diverse hiring?**

Carla Walker-Miller: It goes to intentionality. Everyone who manages a program down to an internal team needs to be intentional. For any industry or discipline or group, if you google a group and discipline and ethnicity, you can find identify a group. It's easy to identify a diverse group and reach them where they live. That is easier to do if you have team members that are diverse and live in those same spaces. One reason why we don't is because we are intrinsically more comfortable with people like us. If we really want to make change, we need to put courage over comfort. Need to go to spaces and places where we haven't been before. Dr. Tony Reames at the University of Michigan found 90% of the money spent is being spent on affluent families. EE should be viewed as a service industry. If this is the intent, then we should be flipping the ecosystem in its head, serving the people.

Holly Spears: As a supplier and vendor, often times in the process of an RFP being sent out, you might not even be on the list. Utilities have diversity specialists, but they are not empowered to be able to provide what they are hired to do. Need to be casting a wider net. There are plenty of resources to tap into to identify a minority organization any trade or supplier. There are no excuses. Do the research. Intention. Commitment. Champion. Measuring. If you're going to onboard, you should track. The best laid plans need revisions. Putting a timeline or deliverable as we do with all projects. Direct Contracting. Developer relationship with the prime. It would be helpful if utilities facilitated those relationships, overseeing to see jhow the relationship is developing. They often have innovative solutions but they aren't at the table for those discussions. Being inclusive. Take a look at your board who's designing these initiatives. Do they reflect the least included?

Delmar Gillus: I like to do a comparison between the barriers brought up today and the processes that the utilities use to bring on equitable contractors. Ask yourself, how does your process line up with those barriers? If you do find dissonance, look at it as an opportunity to make tweaks in hiring process. If you have a potential contractor that is potentially a quality concern. In partnership you can help them enhance their quality and risk over time, make them low-risk.

**Panelist Question 6 – Success Stories: Can you share a success story that you have experienced as a diverse supplier [or in equity hiring]?**

Carla Walker-Miller: We are a Michigan, Detroit-based company. Diversity is a part who we are. One of our first contracts outside MI was with Ameren IL. Ameren IL has both urban and rural services territories. Our first true test was Ameren. For the company that transitioned the team, there was absolutely no diversity. They executed what they know how to do – identify and engage organize spaces and places. Utility doesn't control vendor transition. In some cases, entire teams are fired and hired because outcoming and incoming vendors don't communicate. The implementers should speak with the outgoing staff of the vendor. If some of those staff are diverse and skilled, they should consider hiring them. Ameren was proof of this concept. We feel like we can hire a diverse team no matter what area. Smooth transition is key.

Delmar Gillus: I will highlight one of our partners, Shelton Solutions. Shelton Solutions provides engineering, quality, and other expertise in this space. We have been working with Kelly, CEO, and connecting her with opportunities. She's now hiring more team members to grow her business. Rather than being a sub, she'll be in a place to be a prime and pursue other opportunities. We'd like to see her expand and support other utility programs outside of ComEd.

Holly Spears: As a supplier; commitment from utility clients, support in different ways. One is helping SEEL expand their digital platform, which they reallocated funds from another program, allowed them to invest in their infrastructure. Supporting SEEL, one client looked at their policy and saw it was strict – allowed them to hire a traditionally difficult group.

**Panelist Question 7 – Future of Equity Hiring for EE in Illinois: Do you have a recommendation or a best practice to share on equity hiring that should be considered for the 2022-2025 EE Portfolios in Illinois?**

Nick Dreher: In MEEA's Strategic Action Plan, we developed a goal to support diversity and inclusion. Internal project to support supplier policy, representation access, and identify those pathways. We intend to complete regional diversity research. Looking at requirements and policies, including what is missing and how to improve access. Certification resources. Emphasis at the outset will be directing resources to those interested and identifying what that process looks like. There are some trade allies, hope to develop other strategies with utilities, implementers, and state energy offices. Disseminate best practices. Learn from these organizations and share with members and other states to ultimately convene conversations.

Delmar Gillus: As we look to solve this, in addition to having goals and targets, we need to look at the development and barriers. We can work together to identify solutions to increase participation of diverse businesses in our EE programs. If we attach a number goal, like 40%, it doesn't address the barriers in the development path for contracting partners so that they can be tier 1 suppliers rather than them looking at growth as an insurmountable barrier. There are groups that would love to partner with utilities, but they need to understand the opportunities.

Holly Spears: Diversity is different than equity. Be intentional, commit. Establish deliverables. Have a timeline and treat it similar to programs. Equity is leveling the playing field. Diversity is inclusion.

Carla Walker-Miller: Reach out to returning citizens and veterans. This is transformational for some communities. We changed our starting salary to \$15 an hour. This industry has the potential to change this country and communities.

## **Zoom Chat Comments and Q&A During Equity Hiring Panel**

- Delmar Gillus: Thanks Celia and SAG for the opportunity to participate in this very important discussion. Please reach out if I can be of assistance with any follow-ups. [delmar.gillus@elevateenergy.org](mailto:delmar.gillus@elevateenergy.org)
- Naomi Davis: For sure Blacks in Green has been working to bring awareness and participation in the energy efficiency industry to the black community. Mark Sebree: Great definitions everyone! It's refreshing to hear a variety of ideas and approaches while still remaining laser focused on equity and inclusion.
- Naomi Davis: We are actively building a pipeline and bringing the clean energy economy recognized as such to Chicago's black communities. NaomiDavis@blacksingreen.org 773-678-9541 ABOUT BIG <https://docs.google.com/document/d/1H3wAUJzVyJw3qWUTvUo4uL1zDSXPWWe5hjDPEyGhwM/edit?usp=sharing>
- Yvette Pittman: I've been dealing with complaints from the community about the work force not reflecting the community.
- Delmar Gillus: Very important point Holly about hiring practices for Returning Residents!
- Naomi Davis: Carla you make great and high leverage points in 1) industry measures from a racial lens and 2) utility requirements for equity and parity in hiring. Thank you!
- Sharon Lewis: Agree that one of the most salient points made is that IQ communities should see themselves reflected in the workforce that services them.
- Mark Sebree: Great points everyone! One of the root causes that remain as a barrier is the NOW overt and vocal disbelief in system racism in business, workforce development, etc...
- Naomi Davis: "Requirements" are essential. For example, black and brown ComEd ratepayers who generate 60% of revenues are not receiving a fair return on their investment [paying their monthly bill] when [majority/white] vendors receive almost all the public subsidies [REC's]. Design legislative and regulatory models that produce a proportionate return. That's fair.
- Naomi Davis: Clean Energy Jobs Act [CEJA] has addressed many of these disparities, and folks would be very proud to know how black/brown coalitions have come together to press hard for the programs Delmar is describing. Allies across the bounds of race and class have been essential to translating these commitments into legislation, but black/brown leadership burning the midnight oil and having uncomfortable conversations needed to and did jump start the process.
- Maria Onesto Moran: This is a fantastic panel addressing a vital topic. I encourage all stakeholders to include workforce development for people with disabilities in future conversations.
- Larvetta Loftin: We are a full-service marketing and communications black firm that works with energy and utility companies. We would love to learn about more RFP's for our firm. We believe in creating thoughtful diverse campaigns. [www.theL3agency.com](http://www.theL3agency.com)
- Naomi Davis: If black companies received the resources they deserved, all black communities could be served by vendors who looked like them ~ what BIG considers an ideal outcome.
- Yami Newell: Playing the Google marketing angle still requires maximization skills that continue to be less accessible to Black and Brown run organizations and companies with limited resources
- Naomi Davis: Every Monday from 6-7pm Blacks in Green hosts a GREEN POWER ALLIANCE meeting for trade contractors, clean energy professionals, educators, activists, community-based organizations and others uniquely positioned to enter the clean energy economy. BIG shares industry knowledge, fosters connections, brings in

experts to introduce cutting edge and established technologies, shares job openings, and commercial opportunities...and we have incorporated a worker-owned cooperative of these colleagues to go after the business. We are a trade association: we educate our legislators, train workforce, build vendor capacity, and cultivate markets. We are focused on building ECONOMIES in addition just jobs and contracts. Join us one evening: NaomiDavis@blacksingreen.org

## **Utility Updates on Equity Hiring and Workforce Development**

### **ComEd Presentation (Molly Lunn, Jean Ascoli, and Brady Bedeker, ComEd)**

#### Overview ComEd's Approach to Equity Hiring (Molly Lunn)

- ComEd is thinking about equity among a lot of different groups. Present competing priorities – you can have an excellent minority woman owned business that isn't IL based, but they are doing work here. Challenge to define local, but doesn't mean you shouldn't consider them all. There are some nuances like this that we are noticing.
- Several aspects to consider. Vendor Diversity & Development. Portfolio level contracting and implementation. Service Provider Diversity & Development. Network of contractors. Community based organization, engaging the large network of such organizations. Workforce diversity and development. Been a journey over the past couple of years. Open to ideas in improving who is employed and working on these programs on behalf of ComEd.
- ComEd sees this as a portfolio-wide initiative. This work is important in the Income Eligible (IE) portfolio, but also for the rest of the IE programs. We are considering these opportunities portfolio wide. It would be good to keep this conversation going in SAG, not just IQ Committee meetings.
- We recognize we are in the early stages of work in this space; open to suggestions.

#### EE Supplier Diversity Update (Brady Bedeker)

- Provided definition of diverse supplier: per the guidelines of minority supplier diversity development council, WBE and ES SBA.
- ComEd Goals:
  - In 2019 spent 41% of the total supply chain on diverse suppliers from a goal of 39%
  - In 2020, set a goal to achieve 40% diversity certified suppliers
  - Two Tiers (see slide)
- Reviewed EE Supplier Diversity Tracking and Reporting Slide
- Established a goal to communicate the initiative across the portfolio. Significantly increase spend.
- EE supplier Diversity – Efforts to Grow
  - Hosted diverse vendor lunch and learn.
  - Developed vendor guidelines for reporting diversity spend.
  - Identified and contracted with two new tier 1 diverse vendors for three contracts in 2020. Exelon's DBR working group.
  - Held strategy discussions with implementation contractors to grow their supplier diversity for their program portfolio.
  - Developed database of diverse vendors. We have identified over 2500. Growing the database is key.
- Diverse EE incubator program:
  - Reviewed Goals of program, program design elements and timeline.

- Reviewed Training and Graduation Slide. Including workshop topics.
- Reviewed 2019 and 2020 results and collaboration efforts.
- During planning, we saw an opportunity to collaborate with other ComEd workforce development programs. For example, ComEd's CONSTRUCT workforce development program. Looking at expanding outside construction industry. Some IC's have worked with CONSTUCT too.
- Opportunity to expand to other spaces.
  - Channel CBO Diversity and Development: Income Eligible Outreach Strategy.
  - Despite setbacks this program is near ready to launch.
- Reviewed challenge statement. Messaging from ComEd has not been inclusive to all communities and their cultures. Communication has not been clear, consistent, or intentional across platforms. ComEd is still viewed as a provider, not an advocate. We understand this begins with listening.

#### 2020/2021 Income Eligible Outreach (Jean Ascoli)

- L3 Agency, MWBE, is an umbrella organization, including CBO recruitment, event and educational material development, content and program training, incentive distribution to CBOs and day to day oversight.
- Reviewed CBO, Roles, Value to them and Value to the program. We see this structure as having scalability across CBOs.
- Reviewed Timeline/Next Steps Slide for the Umbrella CBO Engagement Model.
  - To start, we identified initial communities. We are starting with communities with higher percentage of income eligible customers and low participation.
  - Initial communities targeted:
    - Near South Suburbs: Lynwood, Calumet City, Riverdale, Dolton
    - Near West Suburbs: Hillside, Melrose Park, Cicero, Maywood
- Timeline: In Q4 of 2020, we will develop the outreach schedule. In 2021, we will start to have CBO-based pop-up events.

#### **Ameren Illinois Presentation (Kristol Simms, Ameren Illinois)**

- Ameren Illinois focuses on jobs with underrepresented communities, business diversity development that they can grow within the program. Ameren's Market Development Initiative (MDI) was approved in the last EE portfolio.
- We feel like we have a head start on equity issues. We are building our next portfolio on this foundation from the MDI.
- Reviewed Portfolio Diverse Spend
  - Ameren is on target to spend 26% with diverse vendors, over \$7 million, around \$10 million by end of year. We have spent 16% through program allies. We allow self-certification and do some certification, but do not require it. We have 381 self-identified allies.
- Reviewed Illinois Diverse Procurement Slide
  - Allow customers to select and learn about diverse vendors in their community to serve them. We have engaged a diverse vendor so we can look at all areas to develop potential. We aren't just looking at janitorial services. We are looking at all services.
- Reviewed Diverse Business Survey
  - Ensuring we have a commitment to the outcomes of equity hiring. In 2020 Ameren IL engaged Dr. Reames from University of Michigan to do a diverse business survey on behalf of Ameren IL. Participants didn't know Ameren

- conducted this survey. It identified trends that businesses experience, experience as EE supplier, as well as ways Ameren can better engage diverse businesses.
- The purpose of the service was to better position us to provide services. To better understand their perception of diverse certification and address a barrier in concert if it exists. We expect to have an initial draft of results over the next few months, with a full report out by the end of the year.
  - Reviewed Diverse Vendor Database
    - Engaged Walker-Miller (WM) to serve as a partner to review and assess any vendors that are identified. WM uses that info to identify the business services and implementation contractor that need to procure services that the vendors can provide. Since launch, there have been 9 vendors identified through this process.
  - Reviewed Internship Recap Video
    - Internship program has gone virtual due to pandemic. Virtual meetings. Webinars. Offered staffing grants for employers to retain staff.
  - Reviewed Internship Program
    - Reached out to CBOs, CAA, Non-profits and institutions in January. 3rd year of program. 6 different webinars on Wx, career paths, underserved, etc. They've funded 36 internships. Examples of work. Meyer climate control has hired their intern in 2018 and 209 into a full-time position. Worked on HVAC systems within the program. Bridge Heating and Cooling hired their intern in 2020. Provides Energy engineering services. This program doesn't provide direct capital, but Ameren does cover the cost of the internship for local contractors, and they say that the work intern through the summer is valuable.
    - A small contractor who did request an intern was provide a staffing grant, 5 companies, to retain a would-be furloughed employee.
  - Minority Business Development Center Partnerships
    - Currently 5 program allies participating. When your truck is your office, developing a business strategy isn't necessarily a top priority. No matter how many dollars dedicated to that, they don't have time to do the back-office work which is critical to development.
    - Launched a jobs board, IL EE Jobs.com, in partnership with the Springfield Urban League. The board includes job opportunities in Ameren's service territory. Provides wrap around services, like resume support, to support the Urban League's existing wrap around services.
  - Building CAA Capacity
    - We provided grants to two agencies, given installation goals. Access to equipment, not encumbered by state funds, fund sharing obligations. This addressed a barrier.
  - Internship Success Stories
    - Diamond Jackson was an Ameren IL intern in 2018 with the NAACP. Recently completed her degree and was able to secure full time employment with NAACP to educate people in central and southern Illinois about the benefits of smart home technologies and EE.
    - Ed Horton is an Ameren IL intern with Sangamon County CAA. He successfully completed the BPI certification training. Soon will be hired full time by the Agency.
  - *Question (Karen Lusson): Can you provide more detail on communication or outreach strategy, seems like a good way to spread info on the programs.*

- A: It varies from agency to agency. Figure out what programs the agency already provides. Ameren works with them regularly to understand barriers, customer needs, and kits alongside their outreach.
- *Question (Bruce Montgomery): Does Your Diversity Program Produce an Annual Report? And Do you relate the Impact against your EE Goals?*
  - A: We worked with a CAA to develop a database to identify savings (CCRPC in Champaign). That's directly tied to savings targets. Sometimes, if it's a pilot, it may be a less focused effort, where the focus isn't on counting programs savings, but engagement is tracking. CCRPC is looking at all the outcomes from the MDI to provide insights on impact and different success stories in the service territory. They will be providing an annual report this year.
- *Question (Cheryl Johnson): How do you address barriers to participation?*
  - A: Ameren provides certain support services like transportation or hotels if necessary, with support from the business the intern is working for.

### **Zoom Chat Comments and Q&A During Utility Update Presentations**

- **Cheryl Johnson: Does ComEd have a breakdown geographical where your programs work in IL? Where are your contractors located from for example? What is the % of these opportunities are located?**
  - Molly Lunn: Great question – we do have some of this information. As a follow up we can share with you and Celia (to share out with the group).
- Cheryl Johnson: Need the breakdown on membership location that completed the program in the vicinity of Chicago greater areas.
- Cheryl Johnson: Is Construct a minority firm?
  - Elba Aranda: No, it is a collaborative job training initiative
  - Molly Lunn: Cheryl, I'll make sure we give you program geographic info, as well as where participants in the incubator were located!
- Aimee Gendusa-English: Can you re-state the community names?
  - Jean Ascoli: Near South Suburbs: Lynwood, Calumet City, Riverdale, Dolton.
    - Near West Suburbs: Hillside, Melrose Park, Cicero, Maywood
- **Laura Goldberg: It's amazing to hear about the increased direct work between utilities and CBOs. I'm curious how that will impact CBO engagement in SAG/IQ processes, and ability to influence program design directly. Has the SAG thought about how to ensure that more conversations and decisions are open to some of the "financially-interested parties" especially as those expand to include more CBOs? Or perhaps dividing up the types of financially interested parties. Just to ensure that CBOs, particularly those from communities of color, can influence and impact all aspects of utility EE programs.**
  - SAG Facilitator to follow-up with NRDC.
- **Cheryl Johnson: Could all utility companies speak on the cannabis law enacted in IL and does it affect the recruitment drive [for workforce development programs?] Do you test before entrance into the program? If test become positive do you work with that person or dropped them from the programs?**
  - SAG Facilitator to add this question/topic to a future discussion on workforce development.
- Aimee Gendusa-English: How did Ameren identify the diverse businesses that participated in the survey?
  - Angie Ostaszewski: In response to your question - our research partner identified the regional diverse businesses that were invited to participate in the survey.
  - Aimee Gendusa-English: How did the research partner identify them?

- **Follow-up Response (from Walker-Miller Energy Services):** We started our search with publicly available diverse business registries (i.e. Secretary of State, professional organizations, veteran business lists) in 6 states (Illinois, Missouri, Ohio, Michigan, Indiana, Wisconsin). We narrowed those initial 6 lists by randomly selecting participants based on NAICS & SIC codes related to the attached list of EE jobs.
- Sharon Lewis: Getting young people involved in eco-solutions and energy efficiency can be World changing its certainly exciting and speaks to how important and expansive this growing field is.
- Sharon Lewis: As a park lover and an active member of several Park Advisory Councils I would be very interested in learning ways we could get our youth involved in these types of internships and green future trainings
- Angie Ostaszewski: The jobs board is 100% free for both job-seekers and employers so if you have someone who may benefit from this tool please share with them!  
[www.illinoisenergyefficiencyjobs.com](http://www.illinoisenergyefficiencyjobs.com)
- Gregory Norris: Is there an Ameren IL Internship program in Metro East?
  - Angie Ostaszewski: Gregory - the internship covers our entire service territory and organizations in the Metro East are eligible! I can look into getting some additional details if you would like.
  - Gregory Norris: Please! Ameren has headquarters in Collinsville. My objective is to get youth in my area (Metro East) connected to Ameren programs
  - Angie Ostaszewski : Absolutely, Gregory! I'd love to discuss this further with you and if you have any Metro East organizations that would be a candidate for an internship, I would be happy to add them to our distribution list for next year's program.
  - Gregory Norris: What are requirements? Is there an online information link? If information needs to be pick up from your Collinsville headquarters, I'm willing to do that. My email is [mrnorrisg@gmail.com](mailto:mrnorrisg@gmail.com).
- Booker Vance: While it important to give thanks for what is being done. it doesn't compare to what needs to be done in response to the need. one internship? we need greater investment in these communities. Institutional and systemic impact of racism upon these communities... what kind of leadership can Ameren provide in these areas?
  - Sharon Lewis: Ameren has a robust internship program as does ComED Youth Interns
  - Cheryl Johnson: How can I find out about ComEd Youth Interns Program?

## **Growing and Diversifying the EE Workforce: Pandemic Edition**

***Patrick Sullivan and Linda Larsen, Smart Energy Design Assistance Center (SEDAC)***

### **Project Overview**

- SEDAC Mission: Reduce the energy footprint of Illinois.
- Reviewed Workforce Development and Diversification Project:
  - Develop a larger and more diverse pool of qualified EE workers
  - Increase vendor participation
  - Help EE workforce become more resilient
- Started research with two lit reviews. Stakeholder outreach followed. Save the date for Workforce Summit, 11/6/2020. Working to develop a pilot project.
- Reviewed Workforce impacts and resilience to Pandemic:

- USEER projected 8% job growth in 2019. 1.7% job growth actually. Illinois now has about 91,000 workers. In 2019, we were rapidly moving toward a crisis were EE employers are finding it very difficult to fill jobs. (see slide for survey results)
- Reviewed Lack of Diversity Slide:
  - Specific populations, education justice project, wanted to focus on formerly incarcerated individuals.
- EE employers expected 3.7% growth in 2020. Lost about 10% since February.
- The industry is experiencing long-term unemployment. More job losses reported as permanent in EE and clean energy sector.
- Racial and ethnic minorities, less educational attainment, young workers, small businesses, EE service providers were hit hardest.
- Communities with already high energy burden are also the hardest hit by COVID-19 and unemployment, including racial and ethnic minorities, seniors, those with less educational attainment, low-income households.
- Because of the pandemic, this project shifted priorities. Growing EE workforce was more important than ever, but now we needed to look at how to rebuild the EE workforce in an equitable way.
- EE as a pandemic response:
  - EE saves people money for times like this. EE stimulates direct and indirect job growth. This is what we need. It promotes health and safety and combats climate change and builds resilience.
  - EE is not something that we do when it is fine and dandy, we need to focus on it now. It can reduce energy burden for communities for color.
- EE workforce resilience:
  - Building a resilient system. Bounce back and bounce forward.
  - What makes systems resilient? On the surface may seem contradictory. Has both redundancy and efficiency. Ability to online and in person training. Autonomy and interdependence. Ability to produce EE products locally rather than global supply chains. Because manufacturing moved from IL to international, due to the pandemic, this was halted. Interdependence – components are interconnected, bolstering the system’s ability to respond to crises. Collaboration and positive feedback loops. Flexibility and Strength.
  - Diversity equals stability. Diverse jobs, services, training, funding sources, staff and training. There are bottom line economic reasons to prioritize this.

### Lessons Learned

- Lesson 1: Develop “shovel ready” programs to tap into stimulus funds when they become available.
  - However, shovel ready programs are not accessible to minority businesses with less resources.
- Lesson 2: Prioritizing limited funds according to current needs and market value (protected, created).
- Lesson 3: Pay attention to the winners and losers. Disproportional impact clear from COVID-19.
- Lesson 4: Leverage EE workforce development channels to support rapid developments of training and service programs.
- Lesson 5: Emphasize the secondary benefits of EE.
  - Seeing EE as a response to the pandemic. During the 2008 recession, some states invested in CE jobs and others did not. Reasons came down to some

states and political leaders understood the value of green jobs and the secondary benefits.

- Lesson 6: Government mandates can help
- Lesson 7: Ensure long term sustainability of programs. ARRA weatherization funding generated 400 new jobs in Ohio, but most of the jobs disappeared when the funding was gone.
- Lesson 8: Don't neglect employee wellness. Need to invest in employee wellness.
- Lesson 9: Provide opportunities to learn in response to changing circumstances.
  - After an earthquake in Christchurch, subcontracting businesses were overwhelmed with the increasing demand for services.
- Lesson 10: Plan for the next crisis.

### Diversity Inclusion and Equity

- Reviewed Building resilience slide:
  - Programs and jobs for most vulnerable and diversification
  - Increasing diversity, promoting equity: Hiring process
  - What does this look like? Internal and external diversity.
  - Hiring Policies for formerly incarcerated individuals
- Reviewed Needed Reforms Slide:
  - What are the hiring policies regarding formerly incarcerated individuals among energy efficiency employers and utilities?
  - Ban the box policy. Employers with 15+ employees cannot access criminal background check until after an interview conducted. Employers can still choose candidates with better experience, but irrelevant criminal history should not be a deciding factor.
  - Work Opportunity tax credit. Employers up to 40% tax credit of employee's yearly wages when hiring FIP.
  - Fidelity Bonding. Insurance policies that protect employers from employee theft.
- Beyond hiring and recruitment policies:
  - Diversity and inclusion training
  - Partnerships with diverse stakeholder groups improve feasibility
  - Increase outreach to underserved populations
  - Provide comprehensive support
  - Connect training to good programs
- Question (Bruce Montgomery): Who can become a member of SEDAC? Do you welcome Small Biz and CBO participation?
  - A: SEDAC is not a membership organization. You may be interested in the Summit and future workforce development pilot.
  - Kristol Simms: Ameren's intent is to take recommendations and build a pilot. As part of that pilot, we can work with small businesses and CBOs.
  - Molly Lunn: Can ComEd join the Summit to potentially expand this across the whole state?
    - A: Yes

### Zoom Chat Comments and Q&A During SEDAC Presentation

- Aimee Gendusa-English: I believe we used to have involvement from the Safer Foundation, but I haven't heard their name for a while. Can we reach out to them again?

- Annette Beitel: Our criminal justice system is profoundly discriminatory. We need to find a way to include formerly incarcerated people in the clean energy economy. Thank you, Linda and SEDAC for showcasing this important issue.
- Angie Ostaszewski: Kudos to SEDAC and the entire research team! It has been an incredible learning experience for our entire team to work with you on this research project and we look forward to having folks attend the summit in November!
- Naomi Davis: Agreed, heartfelt. Formerly incarcerated are the equivalent of anyone anywhere except they were targeted because they were black men. Don't be surprised when they are smart, productive, creative, and honorable.

### **Small Group Breakout Discussion**

Meeting participants were split into eight small groups to address discussion questions on equity hiring, metrics and reporting, and hiring processes. The notes below were provided to the SAG Facilitator by small group discussion leaders. Notes and small group participant comments are organized under each discussion question.

#### ***Equity Hiring Question 1: What are strategies to increase the number of diverse vendors and subcontractors that deliver EE programs in Illinois?***

- Database approach discussed earlier today. Having resources ready prior to the need. Often fairly tight timeline for implementation. Having resources ready and prior to ask is really important.
  - Walker-Miller has been instrumental in helping Am IL develop the database. Super-helpful when get a quick ask. We've been able to utilize that in an efficient manner. Pretty well organized and categorized by products and services. We have been able to access it efficiently.
- Meadows Eastside recruits volunteers to do our programs. Since we use volunteers, diversity is paramount. We recruit from local block clubs and CBOs. Park advisory councils, churches, community groups. Usually live in communities. Screen volunteers. Returning citizen does not exclude them; determines what their role will be. They may not be going on-site to property, for example.
- Barrier to hiring practices = if someone has a record.
- Hiring prerequisites – help may be needed with insurance issues.
- Identifying items that could be barriers, and helping them be successful. Don't just bring them in the door. Making sure the program fits the needs.
- Getting the partnership established; figure out how to make it work.
- Make sure we don't set false expectations with people about what we can and cannot do. We cannot direct their hiring practices.
- How do I we expect teams to look? Contractors also need to take the steps to diversify the workforce. Even the reporting – how do we do that? Don't set improper expectations.
- Hiring those who have negative records – Illinois Department of Employment security has a fidelity bond available. There is a bond specifically for employee dishonesty. There is a whole list of things that are covered. IL Department of Securities website – Fidelity Bond.
- Shout out to Ameren IL. We have worked with Ameren IL on supplier diversity and contractor diversity as well. They have recently implemented a process. When we are talking about smaller/diverse contractors, they have never really needed a policy of that size. Ameren IL has looked a look at case by case basis. Making a decision about whether this insurance applies.
- I previously worked for Mayor's Office, to get ex-offenders back to work. One of the main focuses the fact that what we trained them about- you are not what you did. That is not

who you are. One of the basic things we have to concentrate on. Get them work ready. Taking them through a workforce development program. Sending them on jobs for hire. Find a company more apt to hire them. They know how to manage their time. They have been vetted. It does not have to be a 12-week training. It gives them the guidelines. Should not have to take 12 weeks. Getting to work on time; soft skills.

- Incubator programs with follow-up after graduation.
- Clear goals with monitoring.
- Intentionality – are there written goals that we are trying to follow? This is the first step in getting to where we need to go
- ComEd – we need to try and do more, and set up our own internal strategy, to have our own implementation contractors committed as well. We are committed to growing this diversity spend across the board. We have a large service provider network at ComEd; there are barriers to getting certified as diverse companies.
- Examples to barriers to getting certified – a lot of our service providers are 1-5 person shops. Sometimes their office is directly out of their home; this could be a challenge to certification. There is also a cost component to getting certified. Paperwork is also a barrier; timing is also a challenge. It can take up to a year to get certified.
- Challenges with how certifications are defined – such as non-profits not being included in the definition of ‘diverse vendors’
- Comparing and organizing a list of diverse vendors across all utilities in Illinois,
  - Non-local organizations – opportunities to work in Illinois, fulfill requirements
- Firm commitments
  - Utilities are in a position to create space to drive innovation within DBEs
  - Establish specific targets - %age targets (spend, number of businesses), specific to the community make up / demographics
- Identify and utilize existing organizations with networks of diverse businesses
  - Illinois Black Chamber, etc.
- Consider alternative approaches to engaging DBEs – sometimes easier to introduce new vendors by engaging on a portion of delivery / a targeted role
- Invite DBEs to the table – create specific roles, welcome them / reach out to them
- Seek local community partners who can assist in reaching new businesses, players within the community
- Ensure a mix of strategies
- Vocational schools, training programs – identify the specific technology / priority need, develop programming within the local schools, connect utilities to those programs for recruitment
  - Ex. – scholarship program with Ameren IL
  - May not require investment from the utilities on funding participant training directly – could see benefit from the partnership
- Require diverse vendors to be certified. Maybe have a group assist vendors to be certified?
- Working with the community colleges in Chicago—building trades, get more involved in that pipeline.
- Encourage energy efficiency in building trade. Connect them with jobs or start their own businesses.
- Local, community partnerships. Don’t just post on linked in. Connect with local community.
- Measurement is really important. Have a baseline, be able to track progress towards goals.
- More grants to have members who reflect community promote EE in that community.
- To find interns: Go through Urban League. Have a great youth program.

- Connect with organizations that serve the populations you are targeting.
- Consider size, expectations: manage the scopes (divide them up) so that smaller organizations can get involved.
- RFPs: How can you communicate opportunities to people?
- Going into communities and seeking out people that have experience or have an idea of how to do business in that area
- Non-traditional outreach – does anybody read classified ads in the paper anymore?
- Getting the word out
- Diverse businesses are hard to locate – only certified are searchable in databases – asking around, verification calls, intentional about efforts
- Making sure of program needs for IC or client – search for those business types in community or nearby community
- Program – incubator approach – make them prepared to have skills and etc. required to be contractor/sub

**Equity Hiring Question 2: What barriers and potential solutions exist for companies seeking contracts with utilities?**

- One of the main barriers is access – access to RFPs and RFIs. Most utilities use some type of portal where they issue the RFPs, RFIs. Contractors don't know that they are there. Networking can take a long time.
- Lack of access to capital.
- Understanding/knowing key decision makers
- Utility Engagement/Relationship
- Access
- How can we track contractors that are heavily diverse within the company, but not certified?
- Partnerships between implementation contractors who are familiar with utility contracting and new DBEs as a launching point to working with the utilities
- Applying for funding/proposals/opportunities
- Certification
- Background, screening requirements—legal, recreational, marijuana
- Criminal records
- Practicum program between implementers and community colleges/trade schools
- Access to capital
- Potential solution: mentoring, building relationships. Mentor/protégé relationships.
- Prioritized: Have a prime and multiple subs for implementation work, task-order
- Training, diverse incubator
- Informal mentoring/buddy relationships to help new service providers
- Application process to apply to be mentor/mentee. SolSmart does this.
- Staffing grants. Get paid for training, certifications.
- Skills
- Contracting
- Even if they have the skillset, can it be improved?
- Equipment old/outdated and needs upgrading
- Enough trucks, and reliable
- Access/knowledge of RFPs

**Equity Hiring Question 3: What barriers and potential solutions exist for utilities in equity hiring?**

- Intern/mentor/trade programs solutions
- Stringent Hiring policies/practices
- Lack of sourcing and relationship with and within community
- We heard a lot about previously incarcerated individuals – how do the utilities approach that? Is there any latitude?
- Is there a reference in FEJA to previously incarcerated individuals?
- Revise / rearrange the criteria used for seeking and engaging diverse vendors
- Not knowing about the organizations out there – outreach, promotion and open calls for information to develop list of potential suppliers
  - Widen the net on RFP solicitations
- Incubate, support DBEs
- How do we get an RFP to people we don't know? Working on solutions – making things more accessible. Inviting people to RFPs, not just known individuals. Search them out intentionally.
- Feedback from vendors – requirements to participate in projects are unrealistic (e.g. insurance not needed for the service/good being provided).
- Management company/coaching through the paperwork process
  - Separate from utility – prevent conflict of interest; arms-length
- Back office capacity and support to dedicate the time for RFP
- Communicate barriers back to utility to improve procurement process – requirements appropriate to level of work being done
- Prime or sub look at providing assistance
- Diverse requirements for contracts – percentage to be filled – often the experience is that the primes are only looking to fill a portion of the contract with a certain type of diverse contractor – not always provided the same opportunity. Bare minimum requirement, no intention beyond that to hire diverse vendors to fulfill needs. Preconceived notions that diverse contractors can't fill the needs.
  - Incentivizing in some way – but have to want to provide equitable opportunity to everyone.
  - Pay-for-performance contract

**Equity Hiring Question 4: How can EE implementers / vendors / evaluators / others also be committed to equity hiring?**

- Offering flexibility (Child care, scheduling, work from home)
- Experience vs Degree
- Training
- Providing flexibility and skill/cross Training
- The challenge is that utilities have not required or demanded this (equity hiring or diverse hiring)
- Implementation contractors, evaluators must meet minimum spend (% of total implementation budget contract) per utility contract requirements
- Host lists of DBEs currently partnered, add based on additional research – make accessible to all vendors within the EE space throughout the space
  - Include communication / promotion
- Continue to expand / adjust during implementation – “no opportunity is too small” – look at all vendor / contracting opportunities

**Metrics and Reporting Question 1: What type of information sharing on EE equity hiring would be useful from utilities and others working in the EE industry? How often and in what format?**

- Tracking and Reporting out monthly, quarterly and annually
- Plan vs Actual
- It would be an interesting metric to know, what is the diversity of the workforce of companies that are under contract with utilities for EE, or for anyone that partners with a utility? Is this also focused on local hiring, or hiring within the state?
- A geographic metric – where is your hiring happening?
  - Geographically it's important that the service providers reflect the diversity of the people receiving the service. But how do you define diversity? The majority of contractors are required to get EE certification through the ICC; perhaps in that process information could be collected on whether that contractor has a diversity certification, and the diversity of their staff?
- As a contractor, required to report dollar amount/% of total charged to utility that goes to WBE, MBE, etc contractors.
- Monthly reports feel too frequent, but quarterly reports might be more appropriate?
- Framing: What information should utilities be providing the industry
- Businesses working with that may be eligible for but do not have a certification – given certifications are expensive, etc.
- Size, type (engineering, etc.) and location of the business
- Reporting what/how much of the incentive dollars go to the EE workforce/contractors
- What number of the utility contractors are minority-owned, women-owned, veteran owned, etc.
  - Note that ComEd has a list of multiple categories to track, prioritize,
  - Better understanding progress
- Percentage of spend, number of DBEs (including total); tracking year-over year changes
- Increase distribution beyond traditional spaces (SAG, ICC)
- Clearly define what role / service the organizations are providing
- Consistent format for the utilities to better organize information
- Outreach – how many vendors reached out to/spoken to/responded to RFP
  - Incentive for going above minimum requirements

**Metrics and Reporting Question 2: What metrics or goals should be considered for IL utilities on equity hiring for the 2022-2025 EE Portfolios? [For example: dollars, individuals, avg dollars per individual, per company, per Chicago Community Area]**

- Using dollars or a percentage could be a challenge; may be complicated to use these as metrics
- Contractors often work on dollars that get passed on to the customer / where do you draw that line? There needs to be careful consideration / recognition that \$ for programs goes to the customer.
- For any of these metrics, we would need to baseline them
- % of spend to diverse vendors
- Goals should align with the demographics of the population
- Goals should be embedded within portfolio, not just for vendors but entire workforce
  - Assigning goals across all aspects, outputs, impacts of the work.
    - Impact contractor workforce in EE, not just office vendors (but also office-related vendors)
    - Overall and granular goals to track where dollars are going on the ground

- Integrate non-profits with a diverse designation – needs to be defined
  - Legislation has been sought
  - Elevate has worked on this
- % hired/% over the requirement

***Hiring Processes Question 1: How can Illinois utilities and others with EE work available in IL equalize the playing field to black/brown vendors or contractors?***

- Sourcing from minority databases
- Transparency
- Relationships so vendor/supplier has firsthand knowledge of program, metrics, pain points, needs
- Facilitating relationships with partners based on strengths and weaknesses
- Outreach and awareness of opportunities; educating the contractors of programs that are available; educating contractors about diversifying their organizations
- Reserve space and resources (make them available) for black/brown vendors/contractors
- Making sure you're doing a good job at vetting and championing those individuals along the way
- There are people that fit the diverse category but they're not necessarily EE driven - so at Walker Miller our job is to help train and champion them along the way to get more opportunities in the utility space
- Intentional recruiting and identification of candidates
- A lot of mentoring, shadowing, and helping along the way
- It's not just enough to get bodies in the program, but it is critical to ensure they are successful
- From a utility perspective - the biggest component is the identification portion. If we had a database of diverse vendors, we would definitely utilize it. We can find diverse vendors but are they developed enough for the specific EE job/role - and are they going to get that return on savings. As much as we want to help those entities grow, our priority is our customer. Nicor gas is very intentional about this. But with all the effort we're doing, we gotta do better. It has to be a no excuse type of mindset. If you can't find it, you have to help organizations develop for the long haul. Has to be intentionally baked in for a role that is long-standing
- It is very important for the utility to really identify these pipelines where people can really feed into
- Being intentional about what roles are available in the EE space
- One of the really important points here, is it is not enough to just identify an opportunity - we have to help shepherd them through the process. We have tried to take an approach to help with staffing grants, and capacity expansion. Dollars are not necessarily guaranteed. As much good as we all think we're doing, there is so much more to be done
- When I look at the Ameren footprint for example, it is really about being that connector to help these companies get to the next level. They have the skill set, they have the capacity, how do you get them to the next level. You don't have to go outside of your community. You just need to help stand companies and organizations up
- Utilities have to be flexible
- Ground up – long term game. Start with younger generation – HS/college aged and provide introduction to the opportunities. Focused in areas where there is a diverse student base.
- Internships are great – multiple points of entry (office, field, installation, etc.) – good way to vet the work ethic and ability.

**Hiring Processes Question 2: How can Requests for Proposal (RFP) processes + bidding opportunities be made more accessible?**

- Access based on capabilities not Tier I or Tier II
- Notification of upcoming bids so they can plan for response
- Providing information to potential bidders on “submitting a successful RFP” would be helpful
- We have to learn to adopt to our usual boilerplate of requirements
- We don’t have all the answers, but learned a lot through the last round of RFPs
- Ameren has expanded our network, and found some new places to post RFPs
- There’s not a silver bullet
- Challenge of utilities going through mergers/getting bought out - which can lead to new corporate requirement and bureaucracy
- Should create internal group within our organizations, to provide assistance to new organizations and businesses looking to complete our RFPs
- It is hard to have these businesses focus efforts on one RFP and potential opportunity
- We need to think about what we require and how this is digested by smaller orgs
- One step Ameren IL took this year - was to share all opportunities available with current vendors
- I wonder if there’s a standardized format we could think about - so that an applicant knows that they are going to be required to have a certification in this. So that way the applicant knows that they need to do x,y, z ahead of time. Is there some standard documentation or standard way?
- Something like when you’re applying for colleges - “the common application” - something like that for RFPs?
- In a way, every utility has things that are specific to them. It would be a combination of some common application pieces and some specifics. So every time I see a utility RFP, I know they will be looking for these few things.
- The RFP process in general is daunting. Between the IT and insurance requirements, it would appear that many small businesses get shut out.
- Has there been an evaluation done of the utility RFPs? What questions are the most burdensome and prohibitive. And if not, perhaps that’s a first step to identify how to make the RFPs more accessible
- Scoring protocol on RFPs can be prohibitive, such as non-profits not getting diversity points
- Also recall intense levels of insurance and IT requirements - so even if a contract can be filled out, the IT piece may be prohibitive
- Have also heard that sometimes it is the parent company requirements that make it particularly restrictive
- One way I’ve heard utilities get around those IT issues, etc. is by doing subcontracting
- Try to ensure that communications is always inclusive of sub, and we could make that a requirement with the prime
- The reality is we’re businesses and businesses are very risk averse, which is way many of these requirements are set in place

**Hiring Processes Question 3: How can training opportunities be made more accessible?**

- Post with community groups, schools, churches....
- Offer subsidized
- Offer within communities via community organizations with morning and evening options
- There is a lot that could be established; we need to balance

- Identify them first – know what the opportunities are

***Additional Comments: Do you have any innovative ideas or suggestions on how equity hiring or workforce development can be supported during the 2022-2025 EE Portfolios in Illinois?***

- Very grateful to the diverse businesses I work with directly with at ComEd, they have been doing critical work now - especially during COVID. Grateful for the work they do with ComEd, and to better the world.
- Getting the word out to identify contractors & prepare them for what's coming – let them know what's coming. Pre-RFP communication – prequalification.
- Are there regions that have done this well that we can learn lessons from?
  - California – lot of success with diverse supplier programs & diverse spend; good public report information on how they recruit and hire and fulfill/pass their spend goals
- Implementing some type of pilot program for Workforce Development and helps diverse businesses develop – certifications, geared toward shaping the future of the diverse businesses; scaling up pilots to full programs & tweaking for success.

**Closing and Next Steps**

*Celia Johnson, SAG Facilitator*

- SAG Facilitator will review comments and suggestions raised during the meeting to consider how to further conversations on equity and workforce development at SAG. SAG Facilitator will also coordinate with IQ North Advisory Committee and IQ South Advisory Committee Facilitators.