

Illinois EE Stakeholder Advisory Group

Large Group Meeting
Tuesday, May 14, 2019
10:45 am – 3:45 pm

Wyndham Springfield City Centre
700 E. Adams St., Springfield, IL 62701

Attendee List and Meeting Notes

Attendees (in-person)

Celia Johnson, SAG Facilitator
Nick Hromalik, Midwest Energy Efficiency Alliance (MEEA), Meeting Support
Kristol Simms, Ameren Illinois
Jennifer Moore, Ameren Illinois
Keith Martin, Ameren Illinois
Deb Perry, Ameren Illinois
Shelita Wellmaker, Ameren Illinois
Stephanie Robinson, Ameren Illinois
Monique Leonard, Ameren Illinois
Mark DeMonte, representing Ameren Illinois
Tammy Jackson, Ameren Illinois
Angie Ostazewski, Ameren Illinois
Christina Pagnusat, Peoples Gas & North Shore Gas
Omayra Garcia, Peoples Gas & North Shore Gas
Molly Lunn, ComEd
KC Doyle, ComEd
Brady Bedeker, ComEd
Erin Daughton, ComEd
Neb Kisic, ComEd
Andy Vaughn, Leidos
Julia Sander, Leidos
Lance Escue, Leidos
John Carroll, Leidos
Jim Jerozal, Nicor Gas
Chris Vaughn, Nicor Gas
Mike King, Nicor Gas
Ted Weaver, First Tracks Consulting, representing Nicor Gas
Randy Opdyke, Nicor Gas
LeAnne Demar, Nicor Gas
Stacey Paradis, MEEA
Theodora Okiro, Future Energy Enterprises
Jennifer Morris, ICC Staff
Karen Lusson, IL Attorney General's Office
Carla Walker-Miller, Walker-Miller Energy Services
Erika Dominick, Walker-Miller Energy Services
Patricia Plympton, Navigant
Jeff Erickson, Navigant
Randy Gunn, Navigant

Rob Neumann, Navigant
David Baker, Energy Resources Center, UIC
Dalitso Sulamoyo, Champaign County Regional Planning Commission (CCRPC)
Ashley Palladino, Resource Innovations
Atticus Doman, Resource Innovations
Mary Johnson, Resource Innovations
Tisha Burnside, Resource Innovations
Zach Ross, Opinion Dynamics
Norris Watson, PCCEO
Cate York, Citizens Utility Board
Michelle Pulce-Flynn, IL Association of Community Action Agencies (IACAA)

Attendees (by webinar)

Frankie Atwater, IACAA
Foluke Akanni, Citizens Utility Board (CUB)
Marge Anderson, Slipstream
Josh Arnold, Navigant
Koby Bailey, Peoples Gas & North Shore Gas
Ingo Bensch, Evergreen Economics
Brett Bridgeland, Slipstream
Ben Campbell, Energy Resources Center, UIC
James Carlton, People for Community Recovery
Ian Champ, CLEAResult
Jane Colby, Cadmus Group
Michael D'Argo, GDS Associates
Shaun Dentice, CLEAResult
Kevin Dick, Delta Institute
Ryan Dougherty, Geo Exchange
Nick Dreher, MEEA
Allen Dusault, Franklin Energy
Wael El-Sharif, 360 Energy Group
Phil Flaherty, Bidgely
Julia Friedman, Oracle
Noelle Gilbreath, Community Investment Corp.
Laura Goldberg, NRDC
Kevin Grabner, Navigant
Andrey Gribovich, DNV-GL
Sandra Henry, WM Energy
Travis Hinck, GDS Associates
Amy Jewel, Institute for Market Transformation
Larry Kotewa, Elevate Energy
Steven McCracken, Bidgely
Samarth Medakkar, MEEA
Fernando Morales, Ameren Illinois
Phil Mosenthal, Optimal Energy on behalf of IL Attorney General's Office
Agnes Mrozowski, Ameren Illinois
Victoria Nielsen, Applied Energy Group
Antonia Ornelas, Elevate Energy
Hanh Pham, Willdan
Emma Salustro, ComEd
David South, WMP

Bryan Tillman, 360 Energy Group
Ted Weaver, First Tracks Consulting, on behalf of Nicor Gas
Tiffany Welch, ICF
Angie Ziech-Malek, CLEAResult
Michael Marks, Applied Energy Group
Gary Ambach, Slipstream
Ken Anno, CIC Energy Consulting
David Bryant
Andrew Cottrell, Applied Energy Group
Mary Ellen Guest, Chicago Bungalow Association
Chester Kolodziej
John Lavalley, Leidos
Alex McGhee, Agentis Energy
Marci Sanders, Resource Innovations
Anthony Santarelli, Smart Energy Design Assistance Center (SEDAC)
Elena Savona, Elevate Energy

Meeting Notes

Ameren Illinois 2018 Update

Kristol Simms and Deb Perry, Ameren Illinois

Key Overview:

- Ameren's diversity vendor spend for 2018 was \$8.5 million (seven fold increase).
- Ameren launched 60 market development efforts in 2018.
- 371 Diverse program allies participated in Ameren's EE programs as of 12/31/18.

Residential Program 2018 Overview:

- 8 different initiatives.
- Appliance recycling
 - First year the program is back post-FEJA.
 - A customer favorite, engaged with a diverse vendor.
 - Recycled 5,876 units.
 - Customers receive an EE kit when the appliance is picked up.
- EE school kits:
 - Distributed 9,048 throughout 2018.
 - Prioritized low-income serving schools.
- Retail products:
 - Over 2,500 EE products purchased in 2018.
 - Achieved our savings goals, it was a successful year for this initiative.
- Income Qualified (IQ) Initiative:
 - IQ registered program ally, successful channel, served over 3,000 customers that received at least one EE measure.
 - IQ CAA engagement, slow start with this channel, served almost 150 homes, it is an evolving process that we continue to try to make better.
 - IQ multifamily, served over a thousand different units, also had a slow start, but have a strong pipeline for 2019.
- Public housing, very successful, 184 building envelope improvements.
- Non-IQ multifamily:
 - Served 3,868 units:

- Karen Lusson: Does this include mechanicals for the whole building?
 - A: The customer would need to go through the business custom for incentives on mechanicals.

Business Program 2018 Overview:

- First year serving public business sector.
- Achieved less savings that we had intended, but overcame a number of challenges that we think will be fruitful in the future.
- Karen Lusson: Is there an affordable housing (new construction) initiative?
 - A: Not a specific program, but affordable housing developers can apply through the business custom program.
- Custom offerings: Targeted marketing efforts, trying to tackle increasing participation in order to be successful.
- Retro commissioning offering: Conducted a training with all service providers, hoping this will drive participation in this initiative.
- Street lighting initiative: Completed a project with city of Decatur. Conducted outreach efforts to community leaders to help them understand the benefits of LED street lighting.

Market Development Initiative:

- Implemented for the first time in 2018 to achieve: Increased EE participation in communities that have not traditionally participated; workforce development efforts and increase number of local diverse candidates; increase number of diverse businesses.
- Partnerships with Community Action Agencies (CAAs).
- Completed a number of outreach efforts by partnering with other Ameren IL departments that had activities planned with certain customer groups, such as bill assistance.
- Provided EE kits at events so that customers could do the installation on their own.
- Senior services and senior heating assistance partnership.
- Offered a Smart Savers Pilot: distributed smart thermostats at no cost to customers. Worked with 7 different diverse vendors to install over 2,000 thermostats.
- 13 Ameren internships allowed individuals to experience the utility sector and EE.

Nicor Gas 2018 Summary

Chris Vaughn, Nicor Gas

Key Overview:

- Some great success stories, and then some areas that we did not reach our goal.
- 68% of forecasted savings goal.
- 10% of IQ savings goal.
- EE education and outreach underperformed.
- Spending also lagged behind (73% of projected annual budget, 8% public sector spend, 47% of projected IQ annual budget).

Residential Program 2018 Overview:

- Residential new construction had some new challenges, specifically the realization of therms savings and so might need to course correct in the future, and if so we will be sure to keep the SAG updated. Cost-effectiveness is a challenge.
- 78% forecasted therm goal was achieved.

Business Program 2018 Overview:

- Small Business and SEM strong performers.
- Business custom experienced some challenges, not all within our control, for example one project was delayed, then there was a fire (i.e. 500K gross terms and \$350K incentive that did not occur).
- Business Energy Efficiency Program had projects that were delayed until 2019; still achieved 67% of forecasted goal. Our pipeline is built for future years.
- Public sector program experienced challenges regarding significant approval process for customers that must be pitched and considered at the correct time.
 - Karen Lusson: One issue that came up in the past was the need for incentives to be higher for public sector customers, is this something that Nicor has observed?
 - A: We did have a different incentive amount for some, but can't speak to whether different amounts contribute to public sector uptick or not.
 - A: Building awareness about the programs is the key, not necessarily the incentive amount. Public sector really just needed information on the timelines. There is a need for holding their hand through the process, not necessarily the incentive amount.

IHWAP 2018 Overview:

- Very slow to launch in 2018. Only had 9 out of the 16 expected CAAs that participated, which lead to inaccurate forecasting.
- IHWAP leveraging had bureaucratic issues, such as the fact that other funding must be used first before utility funding, which means that Nicor's funding was not always utilized.
- 241 single family homes received assistance; 189 units in public housing received assistance.
- Zero safety incidents in the program offering
- Laura: how many buildings were served?
- A: we don't have any multifamily offerings, just public housing of 189 units.

On Bill Financing Overview:

- New vendor starting, tentatively will launch in Q2.
- On Bill Financing – there is interest in talking more offline about parameters for participation (Karen Lusson request).

Additional Updates:

- Combined Heat and Power with PepsiCo (flame on Nov 2018), first CHP commissioned system in the Nicor/ComEd joint program.
- Emerging Technology: Products in the pipeline: Boiler descaling, Low efficiency windows (joint with ComEd), radiator valves.
- Market Transformation: Midwest MT Collaborative
 - Initiatives: BOC, IHP, Codes Baseline, and Commercial Food Service
 - Karen Lusson: Why would we encourage on bill financing when a customer qualifies for IHWAP?
 - A: This is something that needs a more in-depth discussion to try to determine what parameters we could put in place.

2019 Adjustments:

- Diversifying the workforce with contractor channel in the IQ Program.

- Utilizing a broader net of 501(c)3 agencies (Catholic Charities, Rebuilding Together) and other CAAs. \$2.3 million increased spending just in 2019 Q1 due to this broader IQ outreach.
- Expanding Business Custom efforts to increase public sector outreach.

Peoples Gas & North Shore Gas 2018 Summary

Christina Pagnusat, Peoples Gas & North Shore Gas

2018 Portfolio Results:

- 75% of overall therm savings goal
- 90% of spending target
- For business and residential we spent a lot of time building awareness and pipelines, which is why we are a little short, but hope for improvement in the future.
- Business program (49% therm saving goal, 74% spend), need to build pipeline for future years.
- Need to identify strategies to readjust our savings goals in 2019 due to shortfall in 2018.

2019 Q1 Portfolio Results:

- Seeing better results in some areas that had shortfall in 2018.
- On target with IQ savings and spend.

2019 Priorities:

- Enhance our business programs to achieve higher 2019 goals and build 2020-21 pipeline.
- Expand small business program into small and midsize business program to target customer sizes and increase trade ally engagement.
- Restore multifamily program pack to previous levels of success.
- Strong community presence to promote residential programs; engaging HVAC and Weatherization trade allies to build home energy rebate participation.
- Collaborate with existing IQ Community Action Agencies.

2019 Business Program Strategies:

- Working with new partners- EnVita to lead calling campaign targeting NSG public sector and midsize customers.
- Doing targeted outreach to public sector CFO-level outreach (top down approach).
- Launched small and midsize business program, redesigned to better target mid-sized accounts:
 - Launched in late March.
 - Leverages relationships with our partner trade ally networks.
 - Conducted a focus group to better understand the offerings that these customers want.
- Multifamily program:
 - Has taken longer to ramp back up to where it once was.
 - Balancing the project mix to include small projects as well as larger ones that will impact a lot of customers.
 - Customer engagement is being ramped up, along with trade ally that used to be more engaged (offering bonuses to get reengagement).
 - Making sure past customers know there are still opportunities for them to take advantage of.

- Q1 results have already realized therm savings with pipeline investments, exceeding 2018 results.
- Q2 2019 priorities: Convert pipeline therms to realized savings, assess larger portfolios and build upon early success.

Income Eligible Programs for 2019:

- Continue to implement program offerings from 2018.
- On track to meet or exceed income eligible budget targets.
- Researching possible pilots and program enhancements to diversify offerings in future years.
- Participating in the IQ North Program Feedback Working Group.
- Karen Lusson: Given that there is a slower rate of uptick and leveraging IHWAP funding, could there be a shift downward in the programs that the utilities have created on their own?
 - Jim Jerozal: Suggests discussion is needed about the bumps in the road and structural obstacles.
 - Look at the BPI strategy that has worked well that does not have as long a ramp up. Solving the training barrier is crucial. There is a long ramp-up for Agencies to hire staff.
 - Community Action Agencies may be at capacity; we need to look at building capacity in other ways.
 - Concerned about the data we received from DCEO.
 - Kristol Simms: Agrees the training portion is critical to ramping up and can be an issue. There are limitations due to IHWAP granting process. There are also issues related to utilities purchasing equipment for Agencies to use, per DCEO rules.
 - Karen Lusson: My understanding is a new training center is under consideration to open in northern IL; we should check on the status. We should be collectively discussing IHWAP.
 - Dalitso Sulamoyo: Further discussion is needed with the state. There seems to be a focus on braiding with IHWAP; there are challenges that could be further addressed.

Additional Highlights:

- Community engagement:
 - Nearly 70 customer-facing events were held during Q1 2019. This generated more than 780 customer leads for Home Energy Jumpstart program.
 - Weatherization research project:
 - Customer focus groups.
 - Lots of mistrust and information wanted on who is approved to do the utility's work in customer's homes.
 - Response to question on what is meant by customer mistrust: There is a need to better educate and explain to customers what "approved vendor" means, talk about the certifications and to provide additional information that the customer can review and research on their own.
- Worked in partnership with ComEd, featured John Garido as a testimonial that filmed a direct install in his home as it was occurring. Exploring Metra train marketing engagement.

2019 Q1 Takeaways;

- Executing strategies in multifamily, business programs, and income eligible programs to achieve higher 2019 savings goals.
- Researching new program enhancements for public sector, small and midsize business program, and IQ programs to address customer needs and to drive savings.
- Working closely with customers and trade ally network to convert pipeline and leads to completed projects in 2019.

Addressing Equity, Diversity and Inclusion

Carla Walker-Miller, Walker-Miller Energy Services

- Corporate America in the 1980s and 1990s attempted to address diversity by just thrusting minority employees into a business as usual culture.
- In 2015 our company got a DTE EE contract, which was a significant commitment.
- I wanted a company that valued all people. Even though we are an implementor company we strive to be different. Inclusive strategies help communities by creating local energy industry jobs.
- Diversity is not something that we do and talk about; we incorporate it into all aspects of our business.
- There needs to be a safe space in order to address diversity.
- Those that are diverse sometimes need to think how they discuss the topic because they are used to talking about diversity in isolation.
- There are certain types of diversity that we only really understand unless we experience it. Sometimes we don't even understand all the different types of diversity that exist.
- This room is compelled to serve every single customer in every rate class.
 - For example, those with physical disabilities is a significant diverse group that is largely underserved.
- Gender-diverse companies are 15% more likely to outperform their peers.
- Ethnic-diverse companies are 35% more likely to outperform their peers.
- The 30% Club: unintended bias that exists, but if the proportion of the room is 30% similar diverse group, then those voices is not as easily dismissed.
- Diversity: a team of different voices and backgrounds.
- Inclusion: creating an environment where the people feel welcome, respected, supported, and valued to fully participate.
 - Diversity takes effort, inclusion takes intentionality.
- Equity: the barriers that prevent fair treatment, access, opportunity, and advancement requires the elimination of barriers that prevents the full participation of all groups.
 - Equity is scary because it requires disruption. It requires changing our norms. It means some need to be displaced. Need to not see equity as someone winning and someone losing, but rather see that the organization wins when equity is achieved.
 - Equity requires thoughtfulness and compassion. We all need different things to succeed. Equality is about providing the same thing to everyone.
- D&I in EE: Create Inclusive utility and regulatory EE policies
 - Seek committed implementation contractors: recruit diverse residents and business participants; procure resources from local and diverse businesses; track flowback money returned to the local economy
- Recruit and train a diverse workforce

- Need to make sure that regular people are at the table, not just the utilities and businesses. This also does not just mean having an environmental group, we also need diverse rate payers involved.
- Implementer contractors need to spend money in the service territory that contractors are working in, not just letting the money flow to a national program or company.
- Conducted front porch initiative to go door to door to talk and hear from customers and make sure they know the value of EE.
- Kristol Simms: Can you talk about your efforts to impact “flow back” in Ameren’s territory?
 - A: We are looking at what local vendors we can purchase from, looking at everything: shirts, food for meetings, etc. We also do a pre-certification pipeline if vendors are interested; this helps vendors that are not yet diversity certified.
- Theo Okiro: Can you give examples of how barriers have been broken?
 - A: In Detroit we went to high schools and colleges with individuals we knew had fallen through the cracks and asked them to participate in our BPI certification class. We looked for those based in Detroit who faced problems. We then did interviews with these people to identify their issues and see if they could do basic math. We knew that we would have to provide transportation, provide a healthy meal before the class, and present them with respect and ensure that they felt valued. We told them we will do everything we can to make sure you win. Of 24 that started the class, we had 16 complete the class.

MEEA Diversity and Inclusion Working Group Update

Stacey Paradis, Midwest Energy Efficiency Alliance

- Our chair Jim Jerozal asked what can MEEA do to get involved in this space and be a service to our region and members?
- We wanted to see what thoughts our board had for the region but also see what we could do to support our staff.
- We put together a mission, vision and definition of diversity & inclusion for MEEA as an organization by working with a consultant.
- We had a workshop at our conference in 2017 and realized that many of our members were excited about the topic.
- The following year we held two workshops at our conference.
- We are working to finalize our mission and vision in the next month or two.
- It is challenging to get information from people. We had a 40% response rate to our member survey.
 - It wasn’t that members didn’t care, but if MEEA’s main contact was not the correct person to speak on diversity & inclusion then when passed to the correct person there was no response.
 - MEEA’s board took the survey results and then asked what should we learn from this information?
- In 2019 had another conference with workshops focused on equity and on D&I.
- MEEA is developing an 18-month work plan on these two issues:
 - Diversity and Inclusion: how can MEEA be a resource and an information conduit, especially for those members that don’t have capacity to do the research?
 - Also need to help with the workforce pipeline, and share examples of success (don’t need to reinvent the wheel).

- Equity: how do we transform EE programs?
- MEEA is also developing as Strategic Action Plan that will drive growth, staff priorities, and staff performance reviews. This plan includes a pillar on D&I.

Ameren Illinois Market Development Initiative

Kristol Simms, Angie Ostaszewski, Ameren Illinois; Ed Horton, Sangamon County Department of Community Resources

- Community partners (CAAs) are crucial to implementing successful EE outreach and programs.
- We developed a job board with the Springfield Urban League: a one stop shop for IL EE jobs – www.IllinoisEnergyEfficiencyJobs.com. We are interested in expanding this statewide, and for other utilities to post jobs.
- Remediation Training and Pilot program: partners with local union hall to make sure participants have long term job progress.
- Expanded school scholarship program:
 - Broadened eligibility criteria.
 - Also expanded eligible majors for the scholarship. Added carpentry and got recommendations from those that are hiring these people has been a huge improvement.
- 2nd year of our internship program:
 - In the process of finalizing employers. Working to streamline our onboarding process with small local businesses.
 - We are able to award 16 internships for 14 businesses. Ameren covers their wages, and also helping with travel reimbursement costs.
- Ed Horton Testimonial:
 - This program has given me a second chance beyond my basketball career.
 - It has been under a year, but I have completed my CTI training.
 - I have pride in the work I am doing. I have respect for others, I am making intelligent choices, and I am dedicated to my work. Education is important, knowledge is power.
 - I feel good giving back to my community by going into people's homes and helping them with weatherization.
- Ameren IL: We rely on our CAA partners to help us identify the barriers and move forward.

ComEd Diverse Provider Incubator Project

KC Doyle and Brady Bedeker, ComEd

- Started in 2018 recruiting diverse vendors outside of the EE sector.
- In Q1 of 2019 built a database that provides all vendors visibility to diverse subcontractors across our portfolio.
- Planning to partner with implementers to determine ways to track and report subcontractor diverse spend. Also developing key spend goals with our partners.
- 2019 goal for EE portfolio – increase diversity spend by 10%.
- Made the decision to pilot a project to train businesses to join our network.

- Goal was to train and recruit, but also identify barriers and figure out solutions to remove such barriers.
- During recruitment process we identified high level criteria for participation, such as 5 years or more of existence as a business, commitment or interest to EE work. However, these criteria were actually barriers.
- Reminder that we need to do a constant reassessment of the program/pilot.
- Conducted one on one on-site meetings. One workshop we helped businesses with their growth plans. Another time the workshop helped businesses fill out applications.
- Barriers: access to capital, access to projects, skilled workforce, understanding program requirements, diversity certifications, other certifications.
- Q: For the business planning, was that something that ComEd ran internally?
 - A: We used a consulting firm. We used our own implementers to be experts to the cohort.
- Michelle Pulce-Flynn, IACAA: One challenge has been getting our capacity high enough to work in the utility world. Would love to understand who you work with and see if we can exchange experiences and tools so that we can build capacity.
 - A: Agreed, would be happy to connect and share (KC Doyle).
- Karen Lusson: Does your program provide scholarships and training to people similar as Ameren's program? How is this funded, is it through rates or EE? Why are the utilities working individually, this seems to be a great statewide effort?
 - A: It is funded by the EE portfolio, funded first as pilot, but unclear how it will be funded in the future and where we want to take this. I think your point about a statewide effort makes sense, and we are happy to collaborate with the other utilities.
 - Kristol Simms: Ameren IL has been coordinating with Nicor and ComEd on their efforts.
 - Keith Martin: MEEA has taken this conversation beyond a statewide effort, which has been very helpful.

Discussion on Equity, Diversity and Inclusion – Key Questions:

1. What topics need to be further discussed on addressing equity barriers for EE?
2. What topics need to be further discussed on addressing diversity and inclusion barriers for EE?
3. How can SAG and/or the Income Qualified Advisory Committees support the discussion of equity, diversity and inclusion over the next two (2) years?

Written Responses to Question 1: *What topics need to be further discussed on addressing equity barriers for EE?*

- There is a need for better coordination / collaboration between utility IQ EE programs and CAA IHWAP programs to prevent customer confusion and assume all needs are met.
 - Customers with critical home repair needs (flooring, roofing) are difficult to engage.
 - Still deep distrust w/in IQ customer base depending on contractors, utilities, CAAs implementing work. Education is key.
- Increase stakeholders – CAAs should be at the table with discussing barriers for EE.
- Opportunities to leverage other resources / programs outside of just EE funding. Invite other organizations / speakers with initiatives that fit in with EE goals.

- Trust within communities; training barriers; workforce development – promoting opportunities to IQ communities; outreach / reaching IQ communities.
- Increase and broaden stakeholder participation – CAAs, CBOs, community leaders from targeted communities. Sharing policies in place that address barriers that other stakeholders can use at their organizations.
- Additional stipend for childcare, transportation, food.
- Specific examples of equity barriers.
- Examples of failures / missed opportunities and how we can do better in the future.
- Better knowledge and understanding of what the word equity means so people know how to address this as a barrier.
- Measurable goals.
- Discussed heavily items that are working, but more information on failures or lessons learned.
- Program marketing – how do program marketing efforts (and targeted) under or over serve specific customer groups? How do current efforts reinforce (or work to address) existing inequities in EE?
- Can we get a case study on a utility EE program that has grown a business in a targeted community? What is needed to help new businesses?
- Exploring ‘bundled’ incentives for an ‘Assisted Home Performance with Energy Star’ program. This would increase equity for EESPs and participants.
- We should discuss identifying policy efforts to incorporate the needs of developing communities.
- Discuss effect of IHWAP on statewide scale.
- Expanding pilot efforts – taking what is learned from market development and vendor initiatives to expand across service territory and statewide.
- Developing a pipeline – ensuring that scholarship and internship recipients are given the proper resources post-program.
- Identifying areas of equity improvement.
- Developing incentives to increase equity in diverse communities.

Written Responses to Question 2: *What topics need to be further discussed on addressing diversity and inclusion barriers for EE?*

- Good comment about statewide effort needed to address diversity w/in workforce development programs. Everything – programs, initiatives – is too disconnected. Those silos create confusion and missed opportunities. It seems like there are jobs available and there are training programs creating qualified applicants, but the two aren’t meeting up; there must be an underlying structural issue.
- Equity – where programs are being offered, how do we ensure families are tapping into these resources? How do we break down barriers?
- Other job opportunities, ways to better promote all jobs / impacted sectors to residents throughout IL. Expand the network to include those not typically engaged in utility-level implementation in order to train candidates for a larger pool of job openings.
- Overcoming structural barriers to participation in EE trainings/programs, such as addressing constraints preventing returning citizens (insurance, waivers, etc). Paying for transportation, food, childcare, etc.
- Sharing best practices across utility programs.
- Overcoming obstacles for returning citizens (background checks, insurance / bonding).
- Identifying and engaging with organizations that support physically disabled population.
- Map of all current utility-led workforce development efforts / matrix.

- Statewide coordination.
- Gender barriers in Trade Ally network.
- Similar to the above, how can program marketing efforts change social desirability of EE in various groups – and how can this change the inclusivity of EE?
- How do we address the increased costs of diversity & inclusion acquisition? What should we do to promote EE savings goals as well as IQ goals?
- We need more diverse vendors working on EE programs in IL.
- Creating a means by which utilities can collaborate statewide and regionally to share best practices.
- Amplifying CBO feedback so that people based in their communities have voices heard.
- Having honest conversations about how much of concerted effort is utilized to address diversity & inclusion and what specific practices are utilized/implemented to address.

Written Responses to Question 3: *How can SAG and/or the Income Qualified Advisory Committees support the discussion of equity, diversity and inclusion over the next two (2) years?*

- Follow-up on the reports and program updates from today. Help forward coordination and dialogue. Promote efforts to survey and assess challenges (surveys, other working groups like MEEA, other events and opportunities to connect). Involve diversity of employers (including contractors).
- Expand stakeholders to include the very people we are trying to reach.
- Working groups w/ specific plans/action items, not just a forum for discussion (though it is helpful).
- Working groups; inviting CAAs/CBOs to share their efforts; collaboration with utilities.
- Building in time for these topics + discussion into the agenda.
- Workshops, to share what is working and brainstorm.
- Solicit national and regional organizations for case studies of initiatives that are working.
- Make connections across complementary programs.
- Statewide coordination.
- Bringing in more discussion from other parts of the country (Walker-Miller Michigan perspective was very interesting).
- How has the historical bias against inclusion of diverse applications in the trades / unions impacted diverse hiring efforts? If still a barrier, what can be done to remove it?
- How do we ensure all federally-funded hiring program grants and WAP training dollars are leveraged to ensure EE program dollars are spent efficiently, thereby maximizing available funds for income-qualified EE efforts?
- Participants could be less critical and more focused on elevating the good work done in this state.
- Providing more opportunities for presentations such as today to help facilitate learning and continued conversation. I think everyone learned something from today.
- Creating accountability so that barriers raised are addressed in a meaningful way – following up when feedback is presented and creating a proactive approach.
- Allowing CAAs and CBOs to share feedback in a format where they don't fear utility retaliation; creating a context for more honesty.
- We could seriously consider creating a statewide policy that incentivizes measurable diversity, inclusion and equity results.
- SAG can serve as a broker for both Program Administrators, CAAs, CBOs and individual stakeholders looking to enhance diversity efforts. This can be done by:
 - Educating communities on various roles that can be played.

- Notifying others where current opportunities exist.
- Track the participants (Program Administrators, CAAs, CBOs, Trade Allies, stakeholder groups) with diversity demographics as granular as possible.
- I'm encouraged by the discussion and presenters at today's SAG. I think we need to ensure that we're not just talking about diversity, equity, and inclusion - as it pertains to EE jobs. Which is critical. But also as it pertains to who gets to be involved in EE program and policy conversations. As Carla said in her presentation today - every table needs to include "regular people". Especially when it comes to the IQ programs - we need to ensure that the people who these programs are designed for - get a say in what these programs look like in the future. So it's not just a bunch of policy and technical EE wonks in the room deciding what the communities need. And we can't just have one group, one community member - we should be careful about tokenism. But to truly, meaningfully change the way we structure our conversations and policies - so the people who need EE most get a say.
 - I think there's also room to better leverage and coordinate all the great work already happening. So if one contractor or utility is going out to a community to promote and recruit for EE jobs, they're also helping to recruit groups/community members to the IQ meetings and letting them know about all the program available to them.
 - Finally - I think there's room to have programs better account for non-energy savings or at least track additional metrics related to equity, diversity and inclusion. And I know there's some great research already happening around NEBs in IL. So companies can be encouraged to help make holistic change in communities. And account/report on for their diversity, equity, and inclusion efforts. Although some of those holistic changes may come from outside of the EE program \$ in some cases.

Closing and Next Steps

Celia Johnson, SAG Facilitator

- The next large group SAG meeting will be held by teleconference on Tuesday, June 11, to follow-up on health + EE funding opportunities.
- The next in-person large group SAG meeting will be held on Tuesday, September 10.