

# Minimum Equity Standards (MES) 2023-24 Year-End Report Webinar

Presented by Illinois Power Agency and  
Energy Solutions

March 6, 2024



# Meet the staff



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# Agenda

**1** Recap of MES Requirements,  
Timeline, and Deadlines

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**2** MES Year-End Report Overview

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**3** Process for Verifying EEPs

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**4** Year-End Report Scoring

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**5** MES Waiver

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**7** Resources

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## Recap of MES Requirements, Timeline, and Deadlines

# CEJA DEI Goals & the Equity Accountability System

The Climate and Equitable Jobs Act (Public Act 102-0662) amended the Illinois Power Agency (IPA) Act to expand the "**priority access** to the clean energy economy for business and workers **from communities that have been excluded from economic opportunities** in the energy sector, have been subject to **disproportionate levels of pollution**, and have disproportionately experienced **negative public health outcomes**."

## The Equity Accountability System (EAS), includes:

1. **Minimum Equity Standards (MES)** applicable to all applicants to the Agency's Illinois Shines program and competitive procurements.
  - Beginning in **Program Year 2023-24**, which started June 1, 2023, at least 10% of project workforce for each entity that participates in Illinois Shines that year must be comprised of Equity Eligible Persons (EEP). **By 2030**, at least 30% of the project workforce for each entity participating comprised of EEPs.
2. **The Equity Eligible Contractor (EEC)** category within the Program.

# Who are Equity Eligible Persons and Contractors?

## The IPA Act defines EEPs as:

1. Graduates or current or former participants in the Clean Jobs Workforce Network Program, Clean Energy Contractor Incubator Program, Illinois Climate Works Preapprentice Program, Returning Residents Clean Jobs Training Program, or the Clean Energy Primes Contractor Accelerator Program, and the solar training pipeline and multicultural jobs program created by the Climate and Equitable Jobs Act (FEJA)
2. Persons who are graduates of or currently enrolled in the foster care system
3. Persons who were formerly incarcerated
4. Persons whose primary residence is in an equity eligible investment community

**EEC:** A business that is majority-owned by equity eligible persons, or a nonprofit or cooperative that is majority-governed by equity eligible persons, or is a natural person that is an eligible person offering personal services as an independent contractor.





# Scope of Project Workforce



Employees, contractors and their employees, and subcontractors and their employees.



Job duties are directly required by or substantially related to the development, construction, and operation of a project that is participating in or intended to participate.

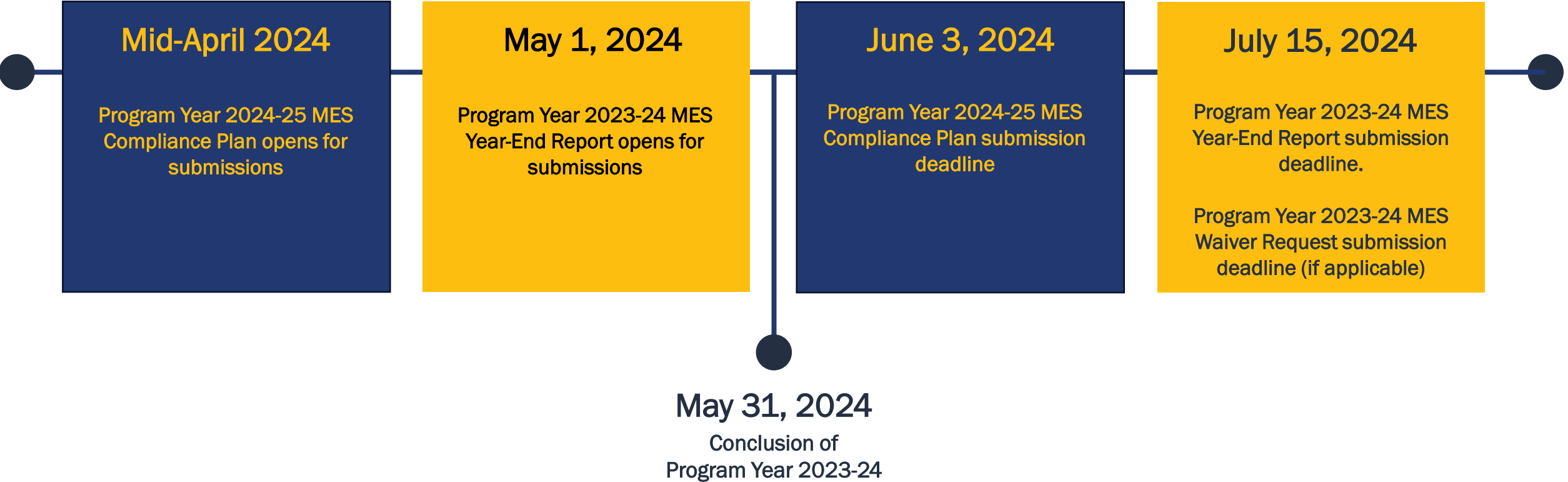


Including workforce in administrative, sales, marketing, and technical roles where those workers' duties are performed in Illinois.

# Timeline Overview

Program Year 2023-24 requirements

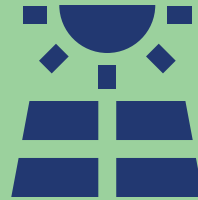
Program Year 2024-25 requirements





# MES Compliance Plan Recap

By June 1, 2023 all non-EEC AVs and Designees were required to submit MES Compliance Plans.



## Outline of AV or Designee plan to achieve the MES for the delivery year

- E.g., the Compliance Plans submitted on June 1, 2023, explained how the AV planned to meet the 10% MES for all projects submitted to Illinois Shines in the 2023-24 Program Year.



If an entity applied to be an AV or Designee during a delivery year, Compliance plans were required at time of initial application





## MES Year-End Report Overview



# Year-End Report Overview

The MES Year-End Report is intended for participating organizations to document compliance with the MES. Required data and information include:

- AV/Designee Information
- Project workforce total
- Project workforce demographic information
- EEP workforce totals, including proof of EEP eligibility and any supporting documentation for EEPs not registered in the IPA's Energy Workforce Equity Portal
- Description of outreach efforts employed by the AV or Designee to recruit EEPs
- Job training program graduate hiring data, Illinois-based workforce diversity data
- ZIP codes for all project workforce
- Other data previously collected during the AV Annual Report

**Achieving compliance with the MES for Program Year 2023-24 means that at least 10% of an AV or Designee Illinois-based project workforce is comprised of EEPs.**





# How is "Program participation" Defined?

For the purposes of the MES, "participation" in the Program includes:



Submitting projects to Illinois Shines



Performing construction on any project intended on being submitted to Illinois Shines



Conducting any sales or marketing activity for projects that have been or will be submitted to the Program



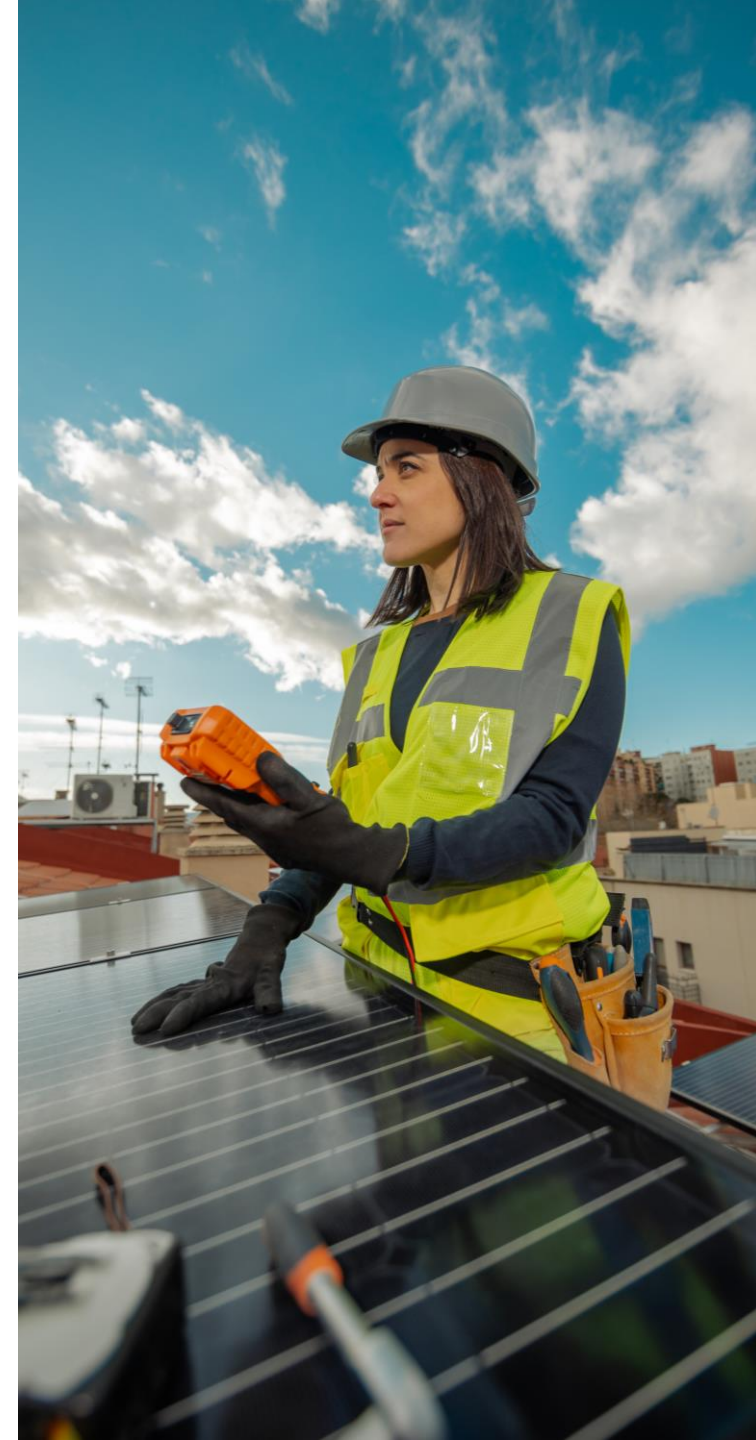
Maintaining subscriptions for a Community Solar project that holds a Renewable Energy Credit (REC) contract (including projects approved prior to the passage of CEJA)



Maintaining a project on a waitlist



Otherwise conducting business on a project seeking or that holds a REC contract



# How does the MES Year-End Report Differ from the Initial MES Compliance Plan?

	MES Year-End Report for PY 2023-24	MES Compliance Plan for PY 2024-25
Submission Deadline	July 15, 2024	June 3, 2024
Intent	The MES Year-End Report is intended for your organization to document how it implemented and achieved compliance with the MES over the applicable Program Year. For this report, the applicable Program Year is 2023-24, and the MES requirement is 10%.	The MES Compliance Plan is intended for organizations to show how they <u>plan</u> to achieve the MES for the upcoming Program Year. In this Compliance Plan, you will explain your organization's plans to conduct outreach and hire EEPs to reach the 10% MES for the 2024-25 Program Year.
Data Required	<ul style="list-style-type: none"> <li>Actual project workforce total</li> <li>Actual project workforce demographic information</li> <li>Actual EEP total</li> <li>Description of outreach efforts employed to recruit EEPs</li> <li>Job training program graduate hiring data, Illinois-based workforce diversity data</li> </ul>	<ul style="list-style-type: none"> <li>Estimated project workforce total</li> <li>Estimated project workforce demographic information</li> <li>Estimated number of EEPs currently in your project workforce</li> <li>Number of EEPs your organization seeks to hire over the Program Year to achieve compliance</li> <li>Communication/outreach plan that will be used to increase the utilization of EEPs</li> </ul>
Who Needs to Submit	All AVs, Designees, and Nested Designees who participated* in the Illinois Shines program during the 2023-24 Program Year. EECs are exempt from the MES requirement but will need to provide other data.	All AVs, Designees, and Nested Designees who intend to participate* in the Illinois Shines program during the 2024-25 Program Year. EECs are exempt from this requirement.

# Year-End Report Submission Process



The Year-End Report will be submitted via a Microsoft Form, which will be shared widely via Program update emails, as well as posted on the Program website and portal.



The submission window for the Year-End Report will open on May 1, 2024; all Year-End Reports are due by July 15, 2024.



All supplemental documentation can be sent via email to [MES@IllinoisShines.com](mailto:MES@IllinoisShines.com)

The image shows three overlapping copies of the Year-End Report form. The top form is the most visible and shows the following content:

**IPA**  
ILLINOIS POWER AGENCY

Illinois Power Agency  
105 W Madison Street, Suite 1401  
Chicago, IL 60602

**IPA**  
ILLINOIS POWER AGENCY

Approved Vendor and/or Designee Company Name  
Approved Vendor and/or Designee ID #(s)  
Name of Person Completing Form  
Job Title of Person Completing Form  
Email of Person Completing Form

During the 2023-24 Program year (June 1, 2023 - May 31, 2024), did your organization submit projects to Illinois Shines, perform construction on a previously Part I approved project, conduct any sales or marketing activity for projects that have been or will be submitted to the Program, manage subscriptions for a community solar project that holds a REC contract (including projects approved prior to the passage of CEJA), maintain a project on a waitlist, or otherwise conduct business on a project seeking or that holds a REC contract?

*If you answer 'no', you do not need to complete the rest of the form. Choosing 'no' to this question will complete your submission. No further action in regard to the MES is required from your organization for Program Year 2023-24.*

Total number of employees/workers on Illinois Shines projects during the 2023-24 program year.  
*Please exclude employees/workers of Designees that your organization worked with on projects this year. For the purposes of the MES, "project workforce" includes: employees, contractors and their employees, and subcontractors and their employees, whose job duties are directly required by or substantially related to the development, construction, and operation of a project that is participating in or intended to participate in the IPA administered programs and procurements. This shall include both project installation workforce and workforce in administrative, sales, marketing, and technical roles where those workers' duties are performed in Illinois.*

**Illinois Shines Workforce Demographic Information**  
Please provide total numbers of individuals in your total Illinois project workforce that belong to each of the following demographic groups.  
*Make sure that the totals provided in this section add up to the total project workforce number provided in question X. Please enter all answers numerically e.g., "0" instead of "none".*

Gender  
- Male  
- Female  
- Other/Non-Binary

Race  
- White  
- Black or African American  
- American Indian or Alaska Native  
- Asian  
- Native Hawaiian or other Pacific Islander  
- Hispanic or Latino  
- Multiracial

2





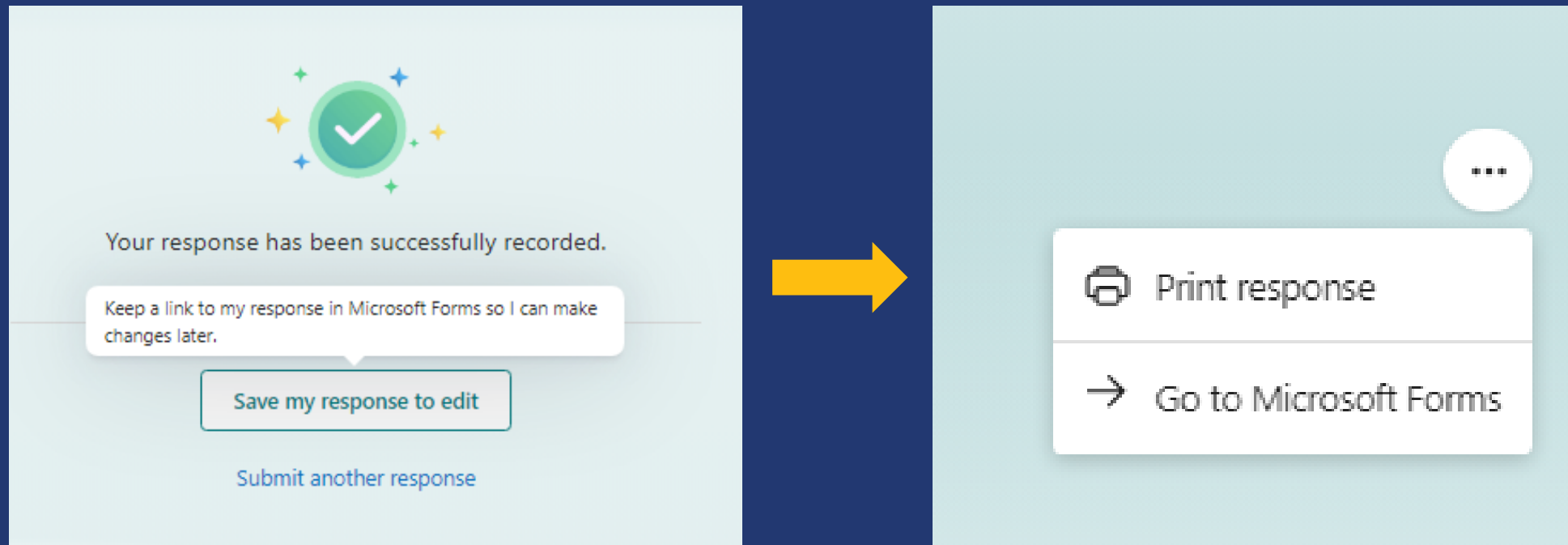
# Demo of Form





# Save/Edit Capability

AVs and Designees will be able to save and edit their responses to the MES Year-End Report







## Process for Verifying EEPs



# The MES Year-End Report requires participating AVs/Designees to verify their EEPs

- In the Report, you will be required to provide the full names of individuals in your project workforce who qualify as EEPs
  - This can be done by either:
    - Having all EEPs register in IPA's Energy Workforce Equity Portal
    - Collecting signed EEP attestations and providing documentation for those individuals' EEP qualifications to submit to the Program Administrator via email
- The Program Administrator will verify EEP qualifications as part of the review process



# Energy Workforce Equity Portal

CEJA directed IPA and the Illinois Department of Commerce and Economic Opportunity (“DCEO”) to help historically underserved communities participate in and benefit from the growing clean energy economy. On January 31, 2023, IPA announced Phase I launch of the Energy Workforce Equity Portal.

## Job seekers can use the portal to:

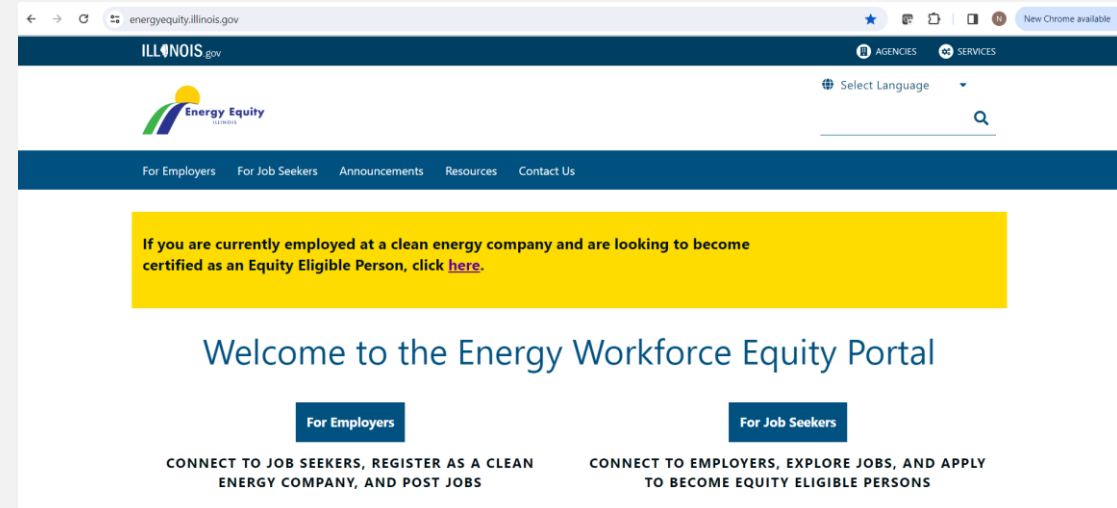
- See if they qualify as an EEP
- Register as an EEP
- View clean energy jobs postings for EEPs

## Clean Energy Project Developers can:

- Advertise clean energy jobs
- Search for EEPs seeking employment


While it is not a requirement to have EEPs registered in the Energy Workforce Equity Portal, this might provide an easier route to compliance with the MES.

Once registering in the Energy Workforce Equity Portal and providing any necessary documentation, an EEP will receive an email from the IPA confirming their status within 5 business days



ENERGYEQUITY.ILLINOIS.GOV

# Energy Workforce Equity Portal (cont.)



## Equity Eligible Persons

Job seekers and individuals who are employed at a clean energy company can qualify as an Equity Eligible Person (EEP) in four different ways\*. Please fill out the information below to complete your application to be considered an Equity Eligible Person.


Contact Info

**First Name \***

**Middle Initial**

**Last Name \***

**Telephone \***

 +1 ( ) - -

**Email Address \***

**City \***

**Basis for Equity Eligible Person Status \***

[Click here for Map of Equity Investment Eligible Communities.](#)

☐ Primary residence is in an Equity Investment Eligible Community (EIEC)\*

☐ Formerly Incarcerated

☐ Graduate or enrolled in Foster Care System

☐ Graduate, current or former participant in eligible job training/workforce development program

**Are you NABCEP Certified? \***

The North American Board of Certified Energy Practitioners offers a variety of certifications for renewable energy professionals. For more information see: [Web Site](#)

☐ Yes ☐ No

**Are you a Qualified Person? \***

The standard to be considered a Qualified Person is contained in the Illinois Commerce Commission's Part 468 Rules for Distributed Generation Installer Certification.

See: [Web Site](#).

☐ Yes ☐ No

**Are you a member of a union? \***

☐ Yes ☐ No

**Personal Info**

This information will be kept confidential by the Agency but may be published on an aggregated basis.

**Race/Ethnicity \***

Select

**Gender \***

Select

**Attachments**

**File Upload**

Please attach the following documents:

1. Upload Proof of your EEP Status
2. Resume (If seeking employment as an EEP)

Drag and drop files here or [browse files](#)

☐ **Final Attestation that information provided is true and complete \***

**Do you want your information shared at this time? If 'Yes', your information will be shared with employers that use the Portal to recruit equity eligible job seekers. \***

If you would not like to have your information displayed to potential employers, please select "No"

Select



# EEP Attestation and Supplemental Documentation

If your organization's EEPs are NOT registered in the Energy Workforce Equity Portal, your organization will be required to collect signed EEP attestations and to provide documentation for those individuals' EEP qualifications to submit to the Program Administrator at [MES@IllinoisShines.com](mailto:MES@IllinoisShines.com).

**The EEP Attestation is currently under development. Additional guidance is forthcoming.**

Supplemental documentation is required for EEPs who qualify based on graduation from a participating workforce training program, or whose primary residence is located in an Equity Investment Eligible Community.

## Acceptable documentation:

For EEPs who qualify based on graduation or current participation in a qualifying workforce training program, please provide either an acceptance letter from the training provider (for current participants), or a certificate of completion from the training provider (for graduates).

For EEPs who qualify based on primary residence, please provide the individual's driver's license, utility bill, lease, mortgage agreement, or other similar documentation for the Program Administrator to verify the individual's eligibility.



## MES Year-End Report Evaluation Process

# MES Year-End Report Assessment

**Year-End reports will be reviewed and assigned one of the following status determinations:**

## **1. Compliant**

The entity has met the applicable MES requirement within their Illinois Shines project workforce

## **2. Non-Compliant**

The entity has either not met the 10% MES requirement within their project workforce, did not submit an MES Waiver request, or was denied an MES Waiver.

## **3. Waiver Granted**

The entity submitted a request for an MES Waiver that was granted by the Agency.

## **4. Need Info**

(Incomplete Submission)

The Year-End Report submission is incomplete. The entity is required to provide any missing supplemental documentation.





## MES Waiver Request Process



# Waiver Overview

All AVs should be working to make progress and achieve compliance with the MES.

If, despite significant efforts, your organization determines that prior to June 1, 2024 it will not achieve the 10% MES goal for Program Year 2023-24, your organization is encouraged to request a waiver.

The Program Administrator will accept waiver requests on a rolling basis until July 15, 2024.

Waiver requests are evaluated against a scoring system and a minimum of 20 points is needed to grant a waiver.

# Waiver Requirements

The Agency will grant waivers in rare circumstances where the applicant provides evidence of significant due diligence toward meeting the Minimum Equity Standards. Per the Long-Term Plan, waiver requests should include:

- 1** A brief narrative describing the entity's effort to recruit EEPs prior to the start of project development, including utilization of the Energy Equity Workforce Database developed by the Agency as well as the following:
  - Working consistently and assertively with approved State job training and workforce development programs to recruit a diverse workforce and provide evidence of outreach.
  - Maintaining applications of individuals not selected for an opening for contact regarding future project openings.
  - Participating in job fairs and related local community events to recruit a diverse workforce.
- 2** Evidence of efforts to hire or contract with EECs, such as communications with affiliated CBOs and/or training program facilities, State workforce hubs, union hall registers, professional development associations, etc. This should include the date of contact, the agency official and title of the individual contacted.

**Minimum Equity Standard Waiver Request**  
*For Projects Participating in Illinois Shines and Utility-Scale Competitive REC Procurements*

**Minimum Equity Standard Waiver Request Program Year Delivery Year 2023-24**

Please use this form to request a waiver from the Minimum Equity Standard. All questions below should be answered truthfully, accurately, and with as much detail as possible.

1. State the name of the entity submitting this waiver request. If this waiver is sought jointly by affiliated Approved Vendor(s) under the Illinois Shines Program, please identify the affiliated entities and explain the nature of the affiliation.
2. Is this waiver request intended for projects which received a Renewable Energy Credit ("REC") contract under the Illinois Shines Program, or through an award under one of the Illinois Power Agency's utility-scale competitive REC procurements?
3. Please list the projects included in this waiver request.
4. Please provide a brief narrative describing the entity's effort to recruit Equity Eligible Persons ("EEPs") prior to the start of project construction. Recruitment efforts may include the following:
  - a. Working consistently and assertively with job training and workforce development programs (**6 points**). Evidence may include:
    - i. Recruitment efforts from workforce development programs, such as correspondence with the Department of Commerce and Economic Opportunity to identify EEP-qualifying workforce training programs in target areas, or correspondence with workforce program staff notifying them of available employment opportunities in the industry
    - ii. Outreach to workforce training programs could include contacting training programs that may not qualify a person as an equity eligible person, but (1) are located in communities where residents may qualify as an EEP based on residency, (2) provide job training to formerly incarcerated individuals, or (3) provide job training to graduates of the foster care system.
  - b. Maintaining applications and contact information of individuals who were not selected for employment but may be contacted for future project employment opportunities. Supporting documentation could include waitlisted applications or reserved resumes and may be required to demonstrate this criterion has been met. (**2 points**)
  - c. Participating in job fairs (in-person or virtual) and related local community events to recruit an equitable workforce (**5 points**)
    - i. Demonstration of participation must be submitted with the waiver request, and could include emails from job fair organizers confirming participation at a job fair or event, printed materials handed out at such events, a list of contacts made at the event, etc.
    - ii. Waiver requests will also receive credit for demonstration of attempted participation in such events, including reaching out to past job fair organizers, etc.

Telephone: 312-793-0263 . Fax: 312-814-0926 . [ipa.illinois.gov](http://ipa.illinois.gov)

**Final waiver linked at:**  
[illinoisshines.com/equity-accountability-system](http://illinoisshines.com/equity-accountability-system)

# Waiver Requirements (cont.)

- 3 Efforts to proactively establish contracting relationships with EECs.
- 4 Advertising or formal solicitation using various platforms of targeted social media. Engagement in direct and extensive outreach to appropriately-targeted associations or other relevant organizations to notify them of the project opportunity.
- 5 Evidence that the entity posted all solicitations on appropriate State agency websites, include direct targeted e-mail alerts to appropriate respondents who have registered with State agencies to learn of opportunities.

Completed waivers should be sent to  
[MES@IllinoisShines.com](mailto:MES@IllinoisShines.com) or [admin@IllinoisShines.com](mailto:admin@IllinoisShines.com)





# Waiver Appeal Process

- A Program participant can appeal any and all decisions made by the Program Administrator to the IPA. While the Program Administrator is an extension of the Agency and works in lockstep with the Agency, the Agency offers this route to Program participants as a matter of course.
- Appeals should be sent in writing to the IPA within 2 weeks of the determination being appealed.



## Consequences of Non-Compliance



# Enforcement of Standards

Non-compliance with the MES may lead to disciplinary consequences, including but not limited to:

1

Notice of Potential Violation

2

Suspension of the entity's ability to submit project applications to IPA programs during the remainder of the delivery year

3

Violations could potentially result in the AV or Designee becoming suspended from the IPA's programs for an entire delivery year





## Resources



# MES Resources

The Program website's Equity Accountability System page offers a suite of resources for Approved Vendors and Designees in meeting Minimum Equity Standards requirements, including:

- *Guide to the Equity Accountability System and Illinois Shines*
- MES Compliance Plan – Program Year 2023-24
  - Submission Form
  - Questions Sample
- MES Waiver Request
- MES Mid-Year Report Submission Form (Due December 31, 2023)
- **MES Year-End Report Draft Template – Program Year 2023-24**
- MES FAQs – last updated October 10, 2023

The Program Administrator holds weekly office hours each Wednesday at 10:00 a.m. CPT, allow individual stakeholders to conference with the team's Sector Strategists and other subject matter experts. Zoom links can be found in the weekly Program announcements.

In addition, the Program Administrator's Sector Strategists support 1:1 meetings with stakeholders.



Find MES resources at:  
[illinoisshines.com/equity-accountability-system](https://illinoisshines.com/equity-accountability-system)

# Sector Strategist Support for Illinois Shines

There are Strategists on the Program Administrator team to support stakeholders in this process.

Strategists are available across each of the six sectors

## **Small DG**

SmallDG@IllinoisShines.com

## **Large DG**

LargeDG@IllinoisShines.com

## **Community Solar**

CommunitySolar@IllinoisShines.com

## **Community-Driven Community Solar**

CommunitySolar@IllinoisShines.com

## **Public Schools**

Schools@IllinoisShines.com

## **Equity Eligible Contractors**

EEC@IllinoisShines.com

General and ongoing technical support can always be accessed by emailing [admin@IllinoisShines.com](mailto:admin@IllinoisShines.com)

MES Compliance questions can be directed to [MES@IllinoisShines.com](mailto:MES@IllinoisShines.com)





Questions





# Thank you!

