An Assessment of Diversity, Equity and Inclusion at MEEA

Insights Report

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2023

Executive Summary

MEEA is committed to cultivating a culture of diversity, equity and inclusion (DEI) within our organization, supporting our members as they pursue similar goals and providing a platform to elevate policies, programs and resources that encourage the diversification of the larger energy efficiency industry as a whole to increase access to clean energy for all. As a priority and strategic pillar, we have a focus of DEI within much of our work, from our events to our policy engagement.

To better understand the needs of our members and the broader energy efficiency industry related to diversity, equity and inclusion, MEEA released a competitive RFP to identify a consultant to support our work. Through that process, we selected Thompson & Associates and worked with them in 2022 - 2023 to audit our members, partners and other peer organizations in the industry. MEEA saw this process as a necessary and important investment. We received 55 responses, with a 20% response rate from MEEA members, program partners, funders and organization peers, like fellow regional energy efficiency organization staff.

As a membership organization, we do this work intentionally and with input from our surrounding community. This equity audit helps us better understand the needs of our members and how to best support our members and the larger Midwest EE industry.

Key Takeaways

Overall, there is significant momentum within DEI across MEEA's vast member base. There is a relatively high level of awareness and interest in employee resources and inter-organizational opportunities for trainings and staff connection. Some organizational categories appear more hesitant to address DEI, however. State and local government respondents indicated their organizations as the least comfortable addressing issues of cultural difference.
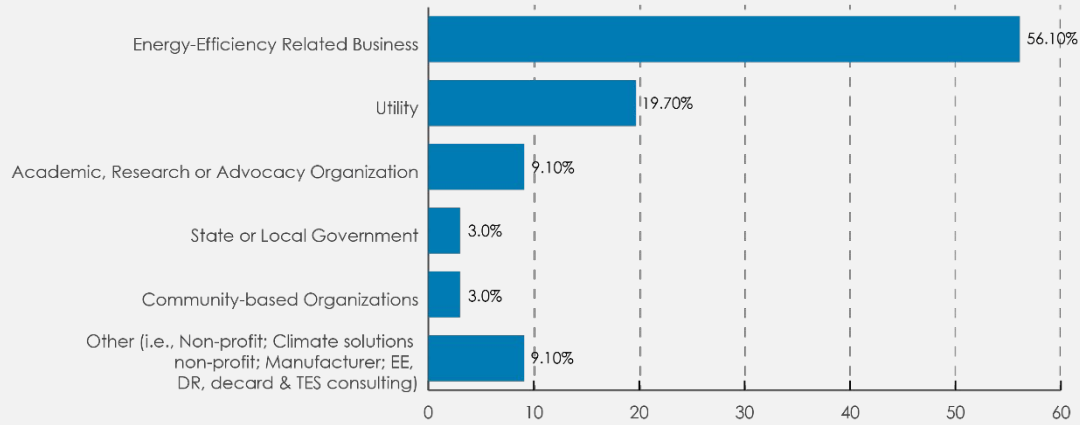
The general feeling around DEI work among respondents related to this audit was very positive and both members and partners are encouraging of MEEA's work. However, while there is a favorable opinion of this work at the industry and organizational level, members want to know more.

DEI work is hard and uncomfortable. It takes intention and effort to be done well. Across the respondents, there is a sense of pride in the work they and their organizations, as well as MEEA, are doing.
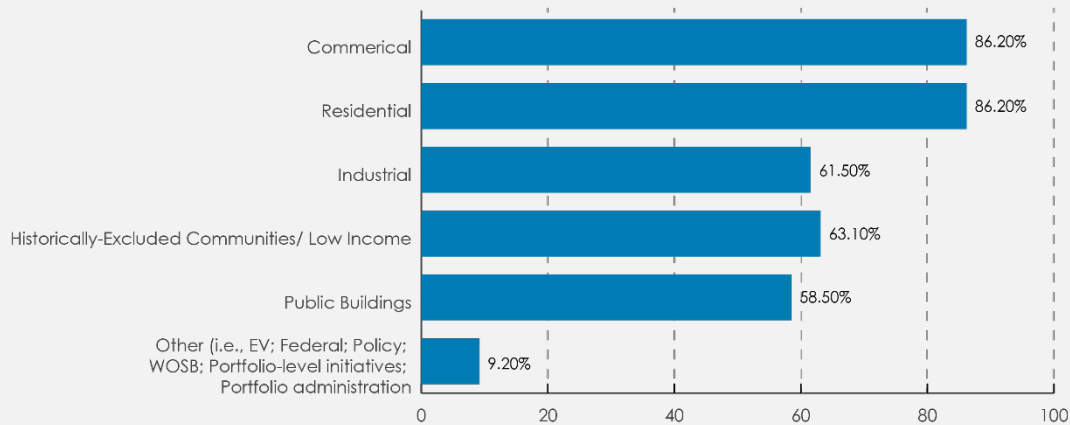
There is also an opportunity for MEEA to be a thought leader in this space. With our role as a convener, MEEA can support members in the implementation of DEI and equity initiatives. Members express a strong interest in getting help in turning "information" into "action." With so many organizations looking for examples or best practices in this space, MEEA is looking to do what it does best and shine a light on those doing the work.
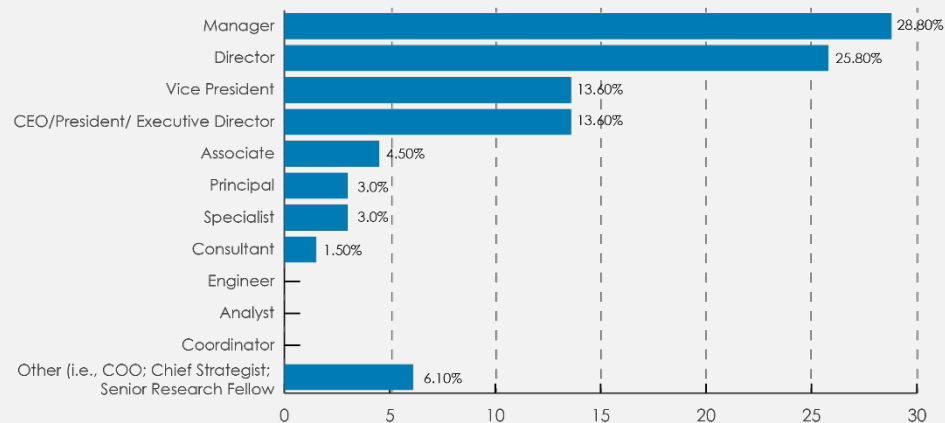
Respondent Demographics

Industry

Category	Percentage
Energy-Efficiency Related Business	56.10%
Utility	19.70%
Academic, Research or Advocacy Organization	9.10%
State or Local Government	3.0%
Community-based Organizations	3.0%
Other (i.e., Non-profit; Climate solutions non-profit; Manufacturer; EE, DR, decard & TES consulting)	9.10%

Focus

Category	Percentage
Commerical	86.20%
Residential	86.20%
Industrial	61.50%
Historically-Excluded Communities/ Low Income	63.10%
Public Buildings	58.50%
Other (i.e., EV; Federal; Policy; WOSB; Portfolio-level initiatives; Portfolio administration)	9.20%

Job Title of Respondent

Category	Percentage
Manager	28.80%
Director	25.80%
Vice President	13.60%
CEO/President/ Executive Director	13.60%
Associate	4.50%
Principal	3.0%
Specialist	3.0%
Consultant	1.50%
Engineer	
Analyst	
Coordinator	
Other (i.e., COO; Chief Strategist; Senior Research Fellow)	6.10%

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DEI Journey Progress

We asked respondents to reflect on where their organization is on its DEI journey. They were asked to make a selection using the following four-point scale:
(1) We haven't started to address DEI;
(2) DEI is new to my organization and we're just getting started with addressing DEI;
(3) We're familiar with DEI and in the process of incorporating DEI into our organization;
(4) We've incorporated DEI into our organization and how we do business.

In the first row of the chart below, average scores are presented for all respondents combined -- no matter the industry. However, the six rows that follow present information broken down by industry. For example, when looking at all respondents together, the average score is 3.6. This falls somewhere between (3) We're familiar with DEI and in the process of incorporating DEI and (4) We've incorporated DEI into our organization and how we do business. However, when focusing on just the organizations that are in the state or local government industry, the average score drops to 2.5.
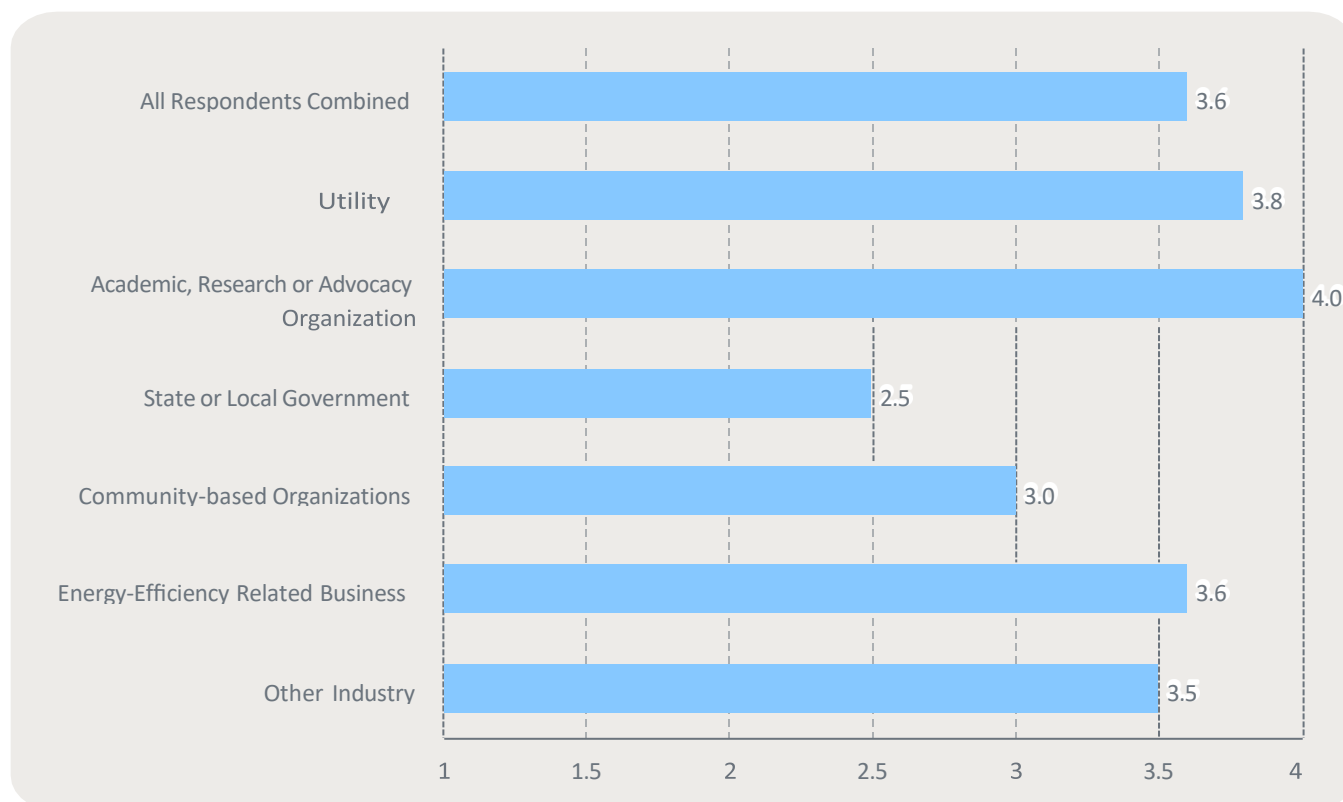
Is DEI a Priority?

Next, survey respondents were asked a question about the degree to which their organization prioritizes DEI. The options were:
(1) DEI is not a priority for my organization.
(2) DEI is not a priority at the moment, but we are exploring options.
(3) DEI is a priority but not at the top of our list.
(4) DEI is a top priority for my organization.

Respondents from community-based organizations indicate that DEI is a high priority, where respondents from for state and local government organizations state that DEI is not a high priority in their organizations.
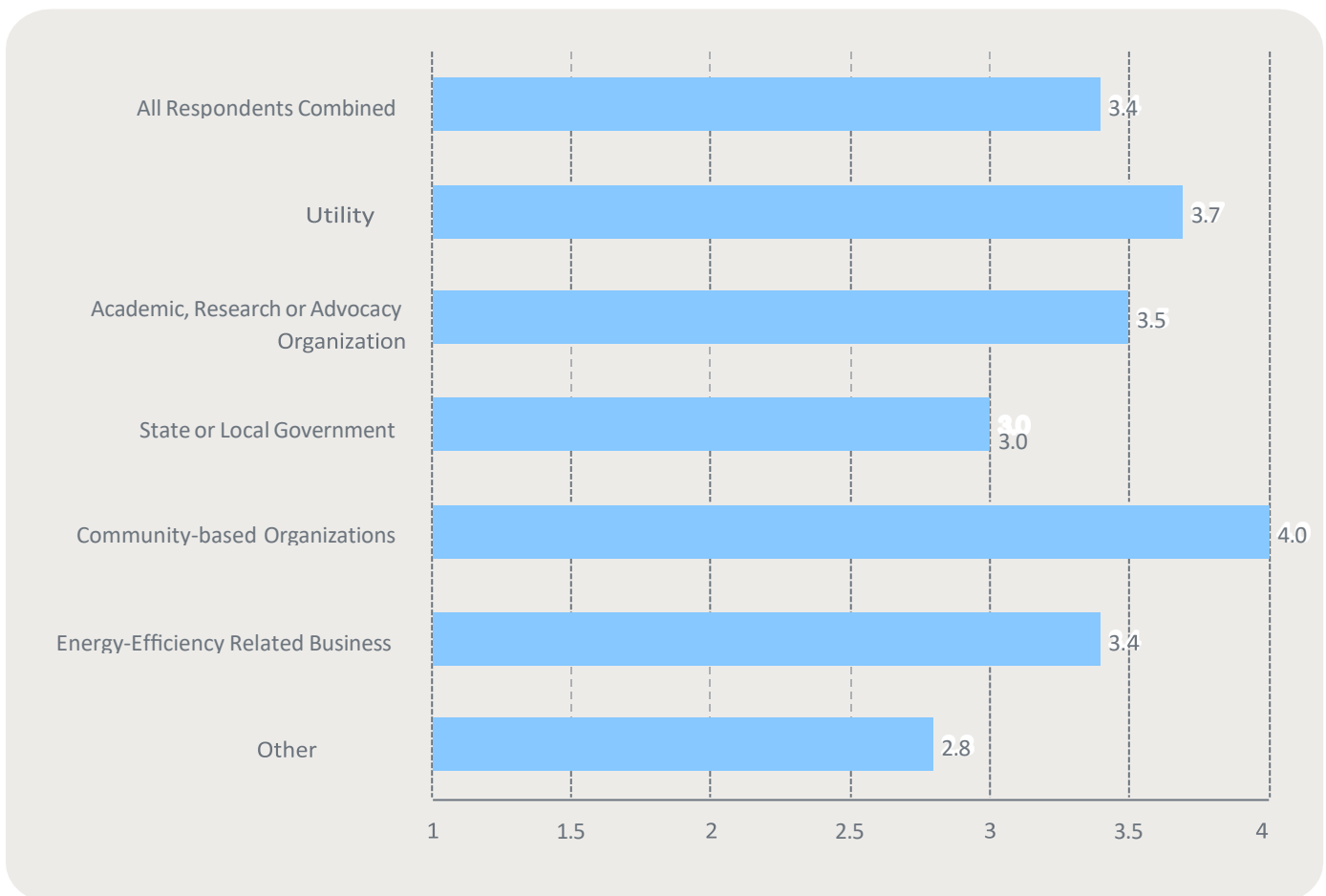
Knowledge About DEI Topics

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We then asked respondents to evaluate their organization's overall level of knowledge of topics within DEI. They used the following scale to indicate the level of knowledge: (1) Not at all knowledgeable;
(2) Not very knowledgeable;
(3) Somewhat knowledgeable;
(4) Extremely knowledgeable.

Academic, research, and advocacy organizations indicate the greatest level of awareness of topics related to DEI. In contrast, state and local government organizations are the least knowledgeable.
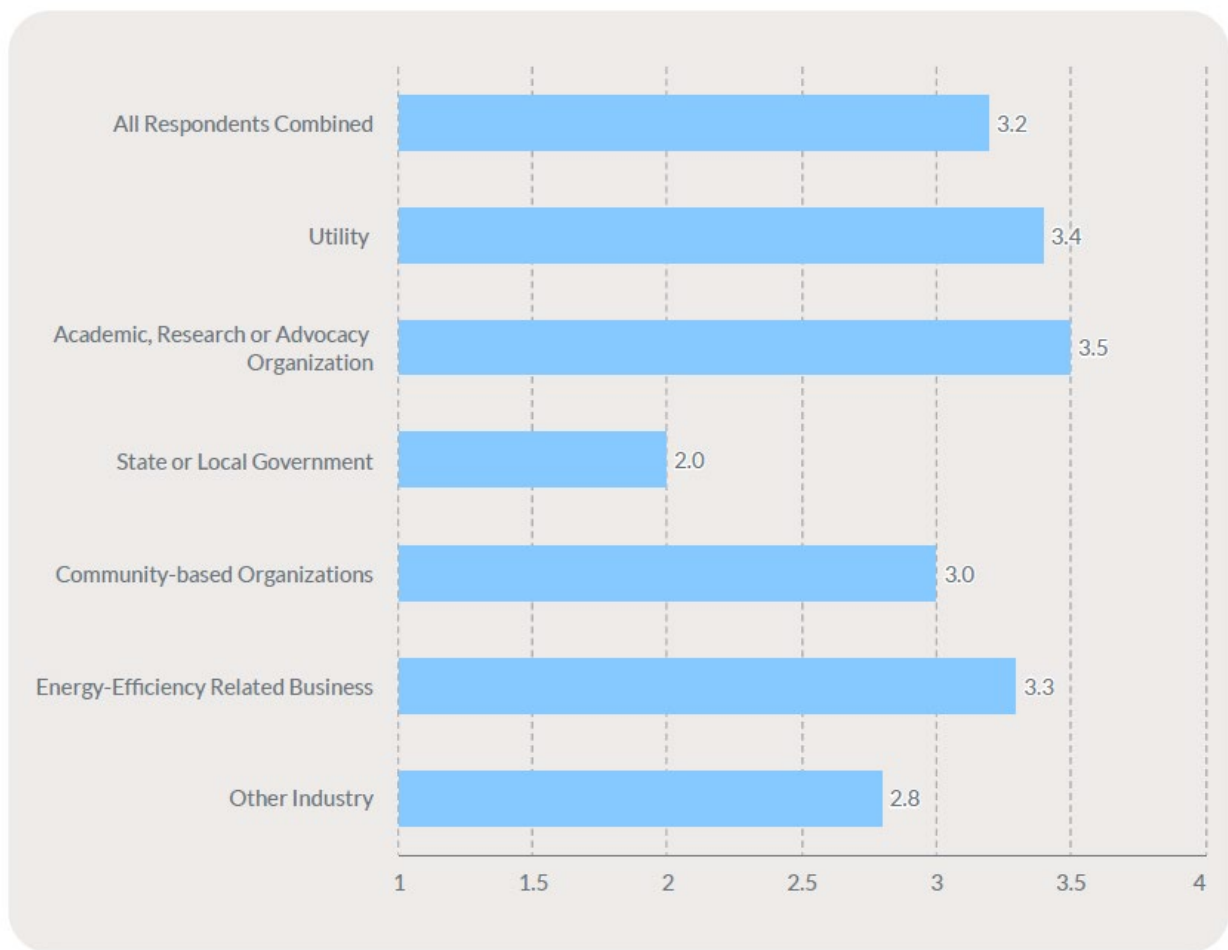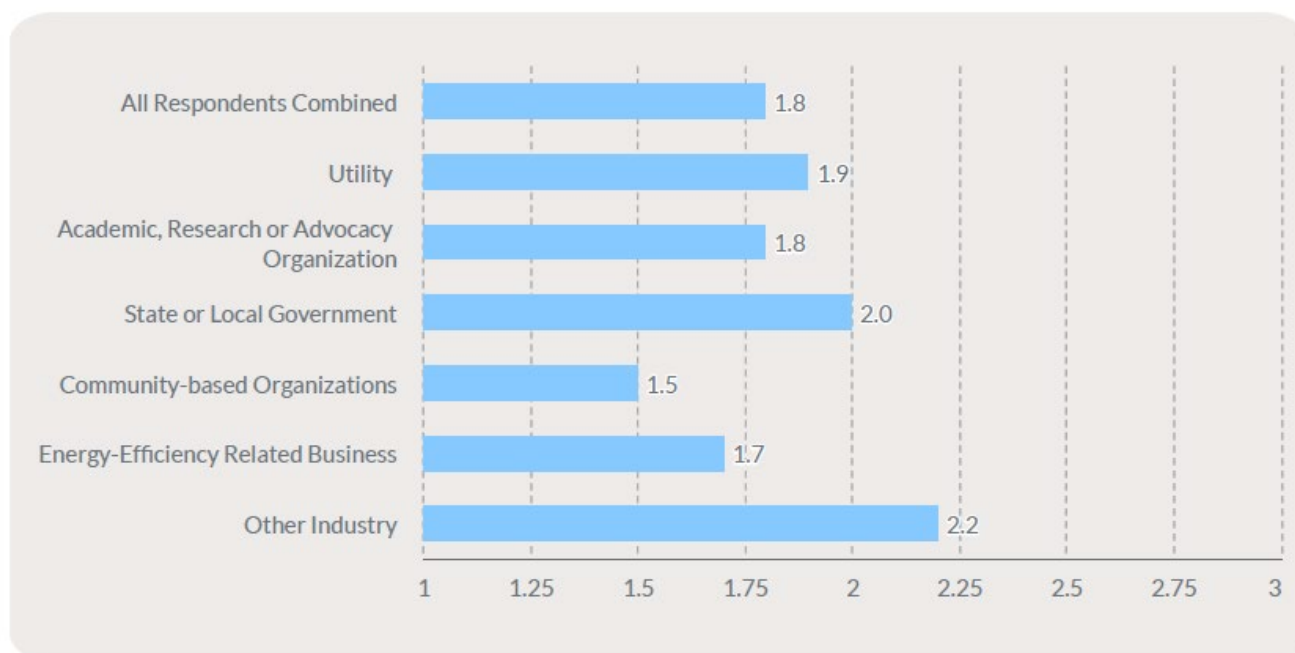
Is Bias Present?

We then turned our focus to bias (an inclination of temperament or outlook). Survey respondents were asked to assess the level of bias they believe is present within the organization using the following scale:
(1) No presence of bias;
(2) Some presence of bias;
(3) Strong presence of bias.

Bias seems to be highest among state and local government organizations, in addition to organizations categorized as "other."

Let's take a closer look at the organizations in the "other industry" category. There were four respondents that chose option number 2, indicating "some" presence of bias. These four organizations include a climate-solutions non-profit, an EE non-profit, an organization in the manufacturing industry, and an organization focusing on EE, DR, Decarb, and TES (thermal energy storage) consulting. These scores are not out of the ordinary when we compare across industries.

In contrast, there was one respondent who chose option number 3, indicating a "strong" presence of bias. This organization is in the non-profit industry has a particularly high bias score, which is driving the average higher. Said another way, the bias score for the "other industry" organizations is higher on average due to this one organization reporting a strong sense of bias.

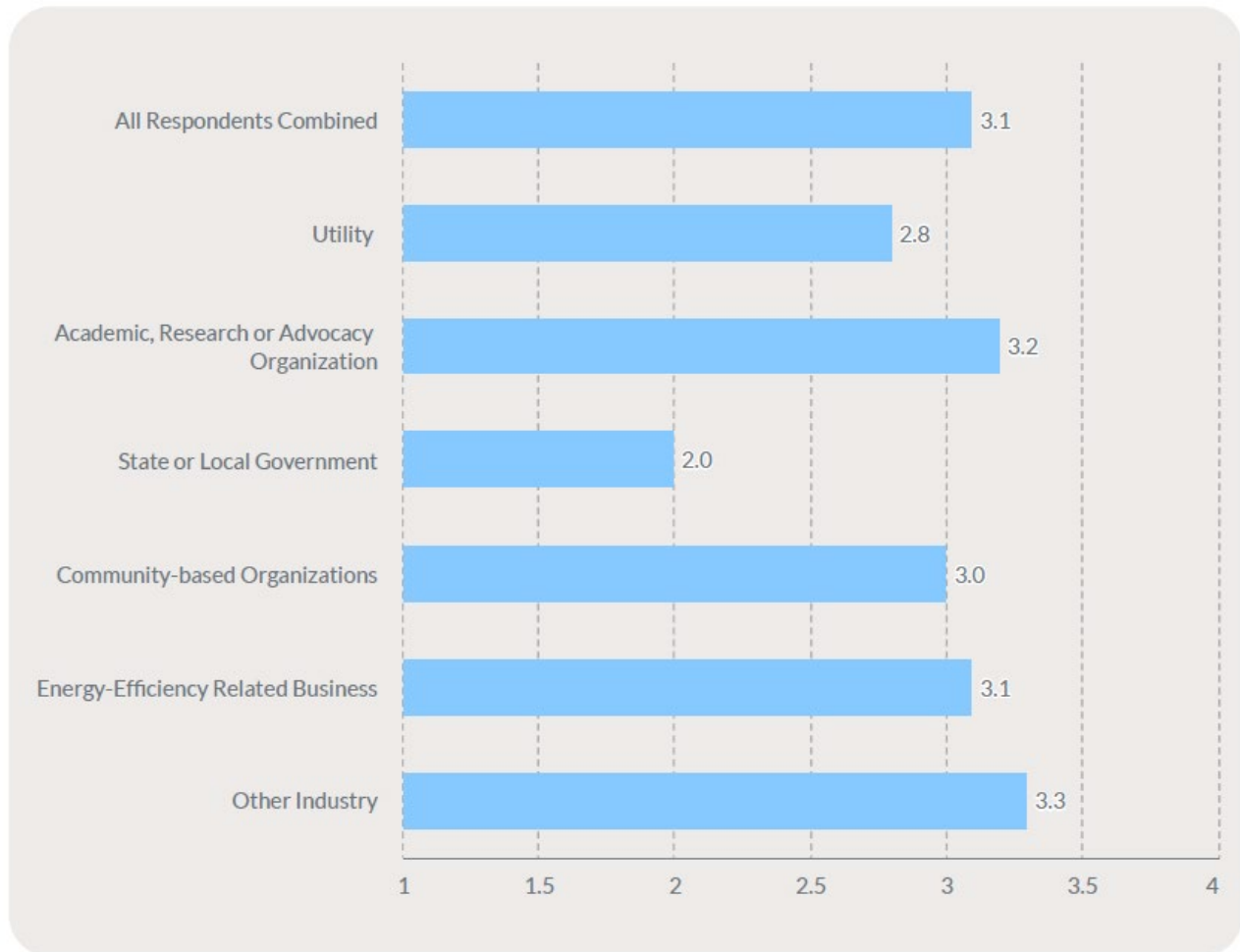| Category	Bias Score
All Respondents Combined	1.8
Utility	1.9
Academic, Research or Advocacy Organization	1.8
State or Local Government	2.0
Community-based Organizations	1.5
Energy-Efficiency Related Business	1.7
Other Industry	2.2

Addressing Cultural Differences

Respondents used a 4-point scale to assess the overall comfort of their organization in addressing issues of cultural difference:
(1) Not at all comfortable;
(2) Not very comfortable;
(3) Somewhat comfortable;
(4) Extremely comfortable.

State and local government organizations are the least comfortable addressing issues of cultural difference, which may explain why bias is so prevalent within this industry.

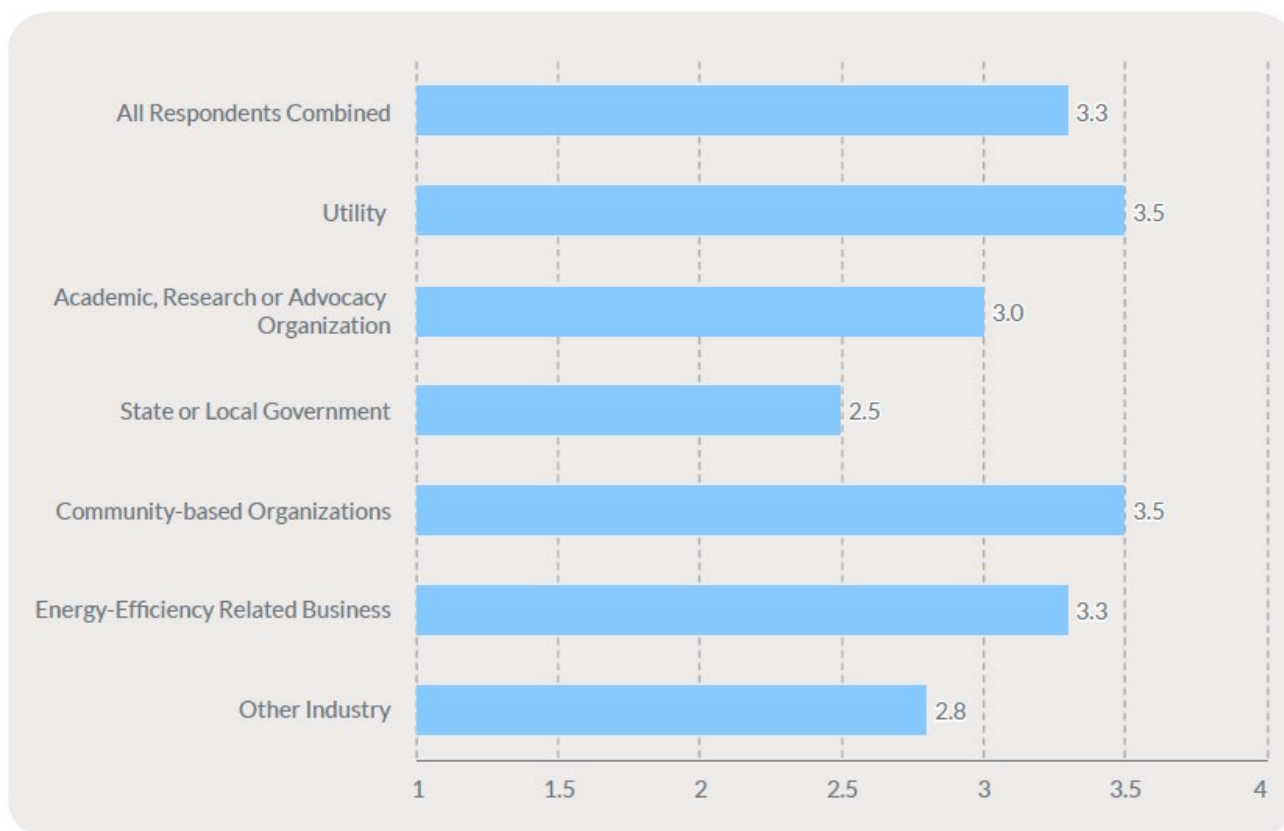| Category	Score
All Respondents Combined	3.1
Utility	2.8
Academic, Research or Advocacy Organization	3.2
State or Local Government	2.0
Community-based Organizations	3.0
Energy-Efficiency Related Business	3.1
Other Industry	3.3

Psychological Safety

Psychological safety is a shared belief held by members of a team that it's OK to take risks, to express their ideas and concerns, to speak up with questions, and to admit mistakes — all without fear of negative consequences.

Respondents were asked to what degree they feel staff/employees possess a sense of psychological safety. They indicated their answer using the following scale:
(1) I am never aware that my staff/employees feel psychological safety;
(2) I am not sure that my staff/employees feel psychological safety;
(3) I am sometimes aware that my staff/employees feel psychological safety;
(4) I am very aware that my staff/employees feel psychological safety.

State and local government organizations are significantly behind other industries when it comes to fostering psychological safety. In contrast, utility-based and community-based organizations are doing the best in this area.

Category	Value
All Respondents Combined	3.3
Utility	3.5
Academic, Research or Advocacy Organization	3.0
State or Local Government	2.5
Community-based Organizations	3.5
Energy-Efficiency Related Business	3.3
Other Industry	2.8

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Initiatives, Policies & Programs

Survey respondents were asked to think about the initiatives, policies, and programs that have been developed within their organization. They were presented with a list of options and asked to select all that apply to their organization. The most popular option was "providing DEI trainings," which has been implemented by 82% of the organizations.

Some respondents chose to write in additional options that were not on the original list. These include DEI councils, DEI book clubs, DEI "message moments" in larger internal meetings, DEI trainings, DEI partnerships with unions and other interventions to foster DEI in the wider community. One organization said they updated their mission, vision and values to address DEI.

Chart data:
- Providing DEI trainings across all staff/employees levels: 82%
- Introducing staff/employees to DEI, i.e., what it is, how it impacts company culture, and why it's important: 79%
- Establishing practices and procedures to eliminate bias in the hiring process: 69%
- Hosting DEI events for staff/employees, partners, members, community members: 60%
- Regularly engaging with employees on internal DEI practices: 52%
- Creating mentorship opportunities: 51%
- Crafting plans for how to communicate about DEI issues: 49%
- Investing in ERGs: 42%
- Others not listed above (See description in text above): 14%

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Initiatives, Policies & Programs

The information from the previous page is presented in a bit more detail below. We can see the percentage of organizations in a particular industry that have engaged with each initiative.

For example, 100% of the organizations in the utility industry have provided DEI trainings, while only 50% of the organizations in the state/local government industry have done so.
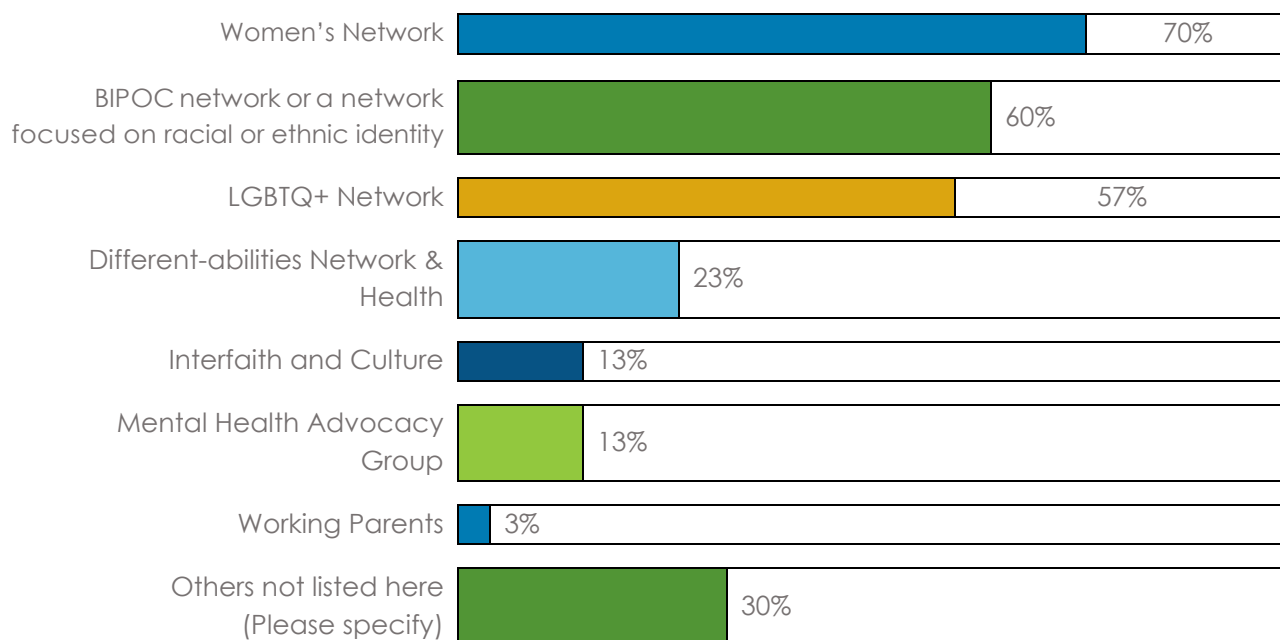
	Utility	Academic, Research, Advocacy	State/Local Government	Community-Based Organizations	Energy-Efficient Related Business	Other Industries
Providing DEI trainings across all staff/employees levels	100%	83%	50%	100%	76%	83%
Introducing staff/employees to DEI	75%	67%	100%	100%	78%	83%
Establishing practices and procedures	75%	67%	50%	100%	68%	67%
Hosting DEI events	75%	67%	100%	50%	54%	50%
Regularly engaging with employees	58%	67%	50%	50%	54%	17%
Creating mentorship opportunities	67%	67%	0%	0%	51%	33%
Crafting communication plans	58%	50%	0%	100%	49%	33%
Investing in ERGs	67%	67%	0%	50%	35%	17%
Other	25%	17%	0%	0%	11%	17%

Employee Resource Groups

Survey respondents were asked what types of Employee Resource Groups (ERGs) are present within their organization. Groups based on gender, race/ethnicity, and LGBTQ+ identity are the most popular. Most of these groups were formed by employees.

42%
Percentage of organizations that said they have invested in **Employee Resource Groups** (ERGs)

Among the organizations with ERGs, what types have been formed?

Type	Percentage
Women's Network	70%
BIPOC network or a network focused on racial or ethnic identity	60%
LGBTQ+ Network	57%
Different-abilities Network & Health	23%
Interfaith and Culture	13%
Mental Health Advocacy Group	13%
Working Parents	3%
Others not listed here (Please specify)	30%

Types of ERGs included in the "other" category:
- Veterans
- Green Team/Sustainability
- DEI Council
- Intergenerational
- Wellness

How were the ERGs formed?
Approximately 37% of the respondents said that their ERGs were formed from the top down. Approximately 63% said that the formation of their groups were employee-driven.

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MEEA's DEI Statement & Strategic Priorities

Before answering the next part of the survey, respondents were asked to read MEEA's Diversity, Equity, and Inclusion (DEI) statement:

"MEEA is committed to cultivating a culture of diversity, equity and inclusion within our organization, supporting our members as they pursue similar goals and providing a platform to elevate policies, programs and resources that encourage the diversification of the larger energy efficiency industry as a whole to increase access to clean energy for all."

In 2019, MEEA adopted a new strategic action plan for 2020-2025. Within this plan, we committed to developing, supporting and promoting innovative and impactful policies and actions to strengthen the energy efficiency industry by prioritizing equity, inclusion, access and diversity. Under this goal, MEEA is working to:

- Promote and develop equitable and inclusive energy efficiency policy and industry best practices
- Collect a database of diverse suppliers, guidance on how to get certified and identify certification challenges
- Research and share successful policies and programs reaching underserved communities
- Identify additional programs and trainings that could be adapted to reach underserved communities
- Explore pathways to reduce energy burden in the Midwest

MEEA's strategic action plan is a driving force for our organization and this goal is an important pillar of our work.

This organizational work is supported by a Diversity, Equity & Inclusion Steering Committee made up of MEEA members and board members, serving as a sounding board and resource for MEEA's efforts.

Awareness of MEEA's DEI Statement
& Strategic Priorities

Respondents were asked to rate the level of awareness they have about MEEA's DEI statement and strategic priorities. They indicated their answers using the following scale:
(1) I am not aware that MEEA is addressing DEI;
(2) I have heard about MEEA's statement and priorities;
(3) I am familiar with the statement and MEEA's priorities;
(4) I am very much aware of what MEEA is doing in DEI.
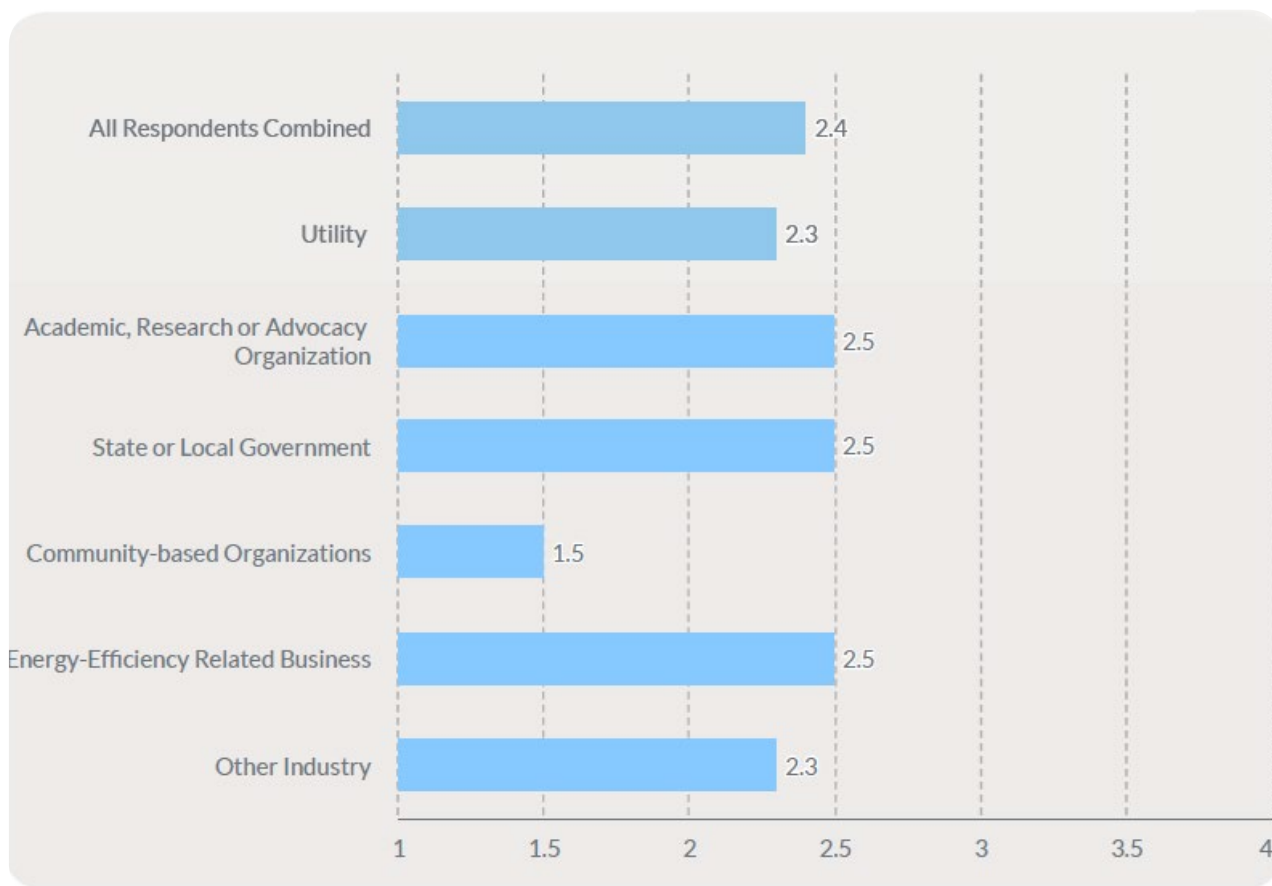
Generally, respondents are aware of MEEA's DEI statement and strategic priorities but there is more work we can do to share these externally. Much our DEI work is woven into our larger initiatives, but we can pull that out. There can be a hesitation to speak too much about our work, that it may come across as ingenuine, but people should know about our commitment of our time and our work to this important space.

Reaction to MEEA's DEI Statement & Strategic Priorities

Respondents were asked about their reactions to MEEA's DEI statement and strategic priorities. They indicated their answers using the following scale:
(1) MEEA's DEI statement and priorities are not appropriate or sufficient in supporting industry growth and adoption and should be improved;
(2) MEEA's DEI statement and strategic priorities are adequate but could be improved;
(3) MEEA's DEI statement and strategic priorities are clear and sufficient in supporting industry DEI growth and adoption.

Approximately 19% of respondents said they had no opinion. Reactions provided by the remaining 81% of respondents are presented in the chart below. Overall, there is a positive reaction across industries.
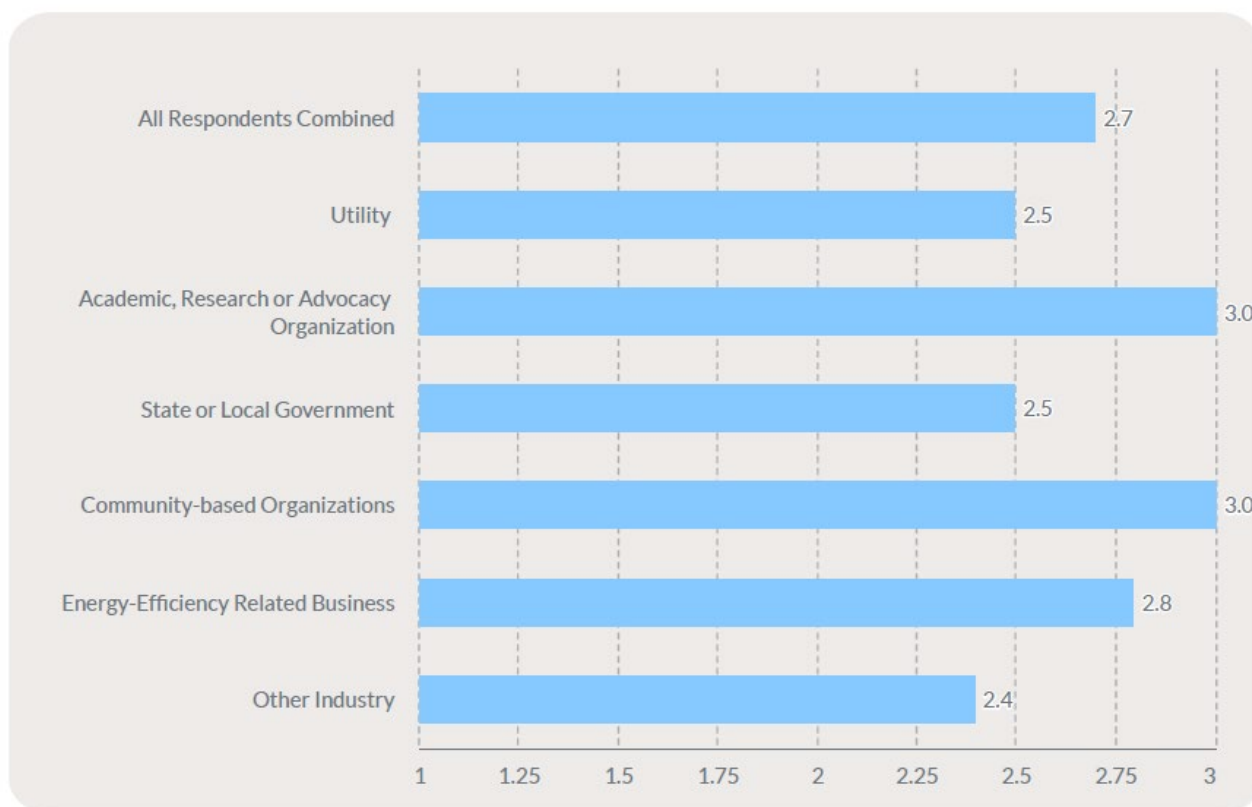
Evaluation of MEEA's Strategic Priorities Implementation

Respondents were asked to evaluate MEEA's implementation of its strategic priorities within "developing, supporting and promoting innovative and impactful policies and actions to strengthen the energy efficiency industry by prioritizing equity, inclusion, access and diversity."

They indicated their answers using the following scale:
(1) MEEA has done very little around implementation of DEI strategies;
(2) MEEA has done a somewhat comprehensive job at implementing DEI strategies;
(3) MEEA has done a comprehensive job at implementing DEI strategies.

Approximately 23% of respondents said they were not aware that MEEA had done any DEI implementation. Evaluations provided by the remaining 77% of respondents are presented in the chart below.
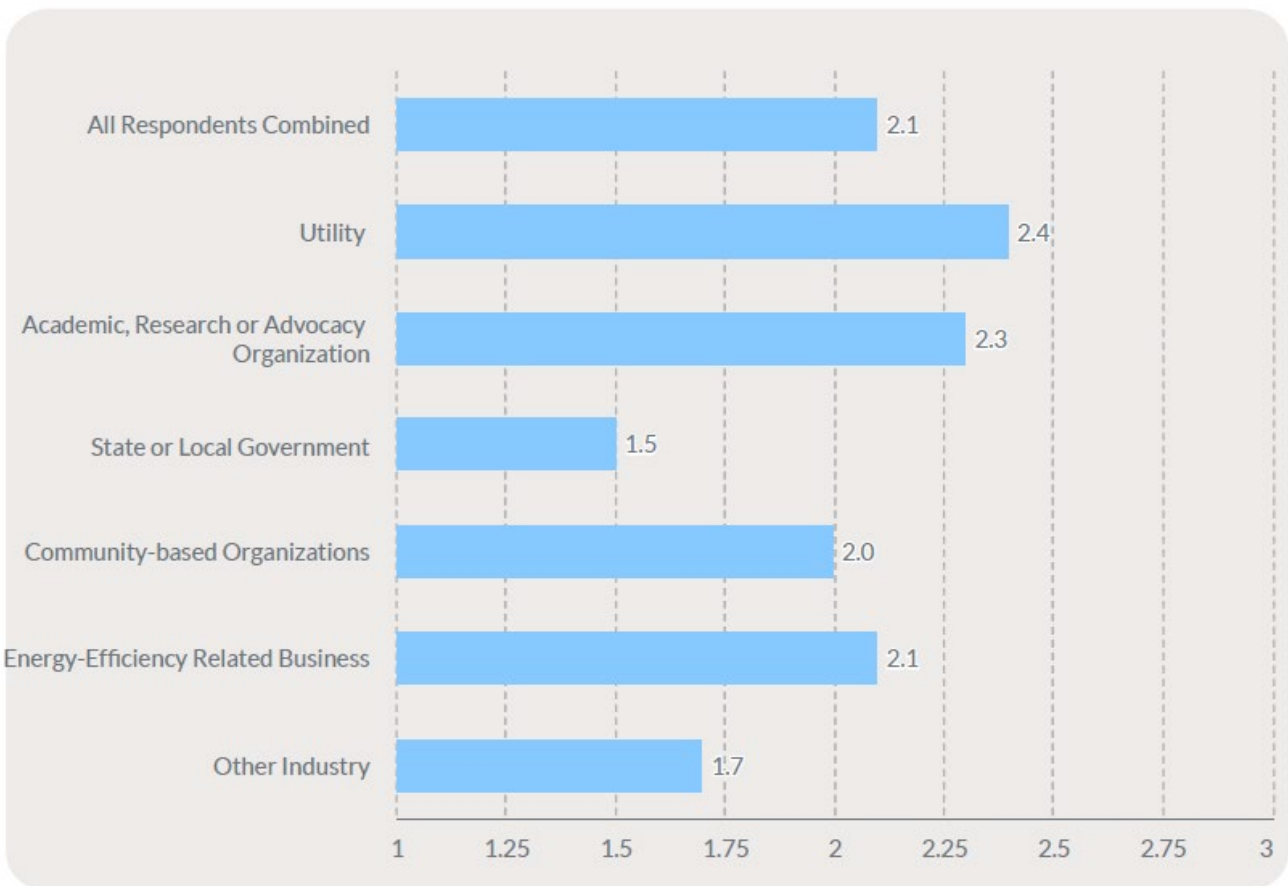
Overall Impact of Other Initiatives

Respondents were asked to assess the overall impact/value of MEEA's other DEI-focused organizational initiatives. (For example, Energy Efficiency For All low-income multifamily campaign, work of State coalitions, other stakeholders).

They indicated their answers using the following scale:
(1) Not impactful at all;
(2) Not very impactful;
(3) Somewhat impactful;
(4) Very impactful.

Approximately 34% of respondents were not sure of the impact of MEEA's other DEI-focused organizational initiatives, however the remaining 66% of respondents are presented in the chart below.
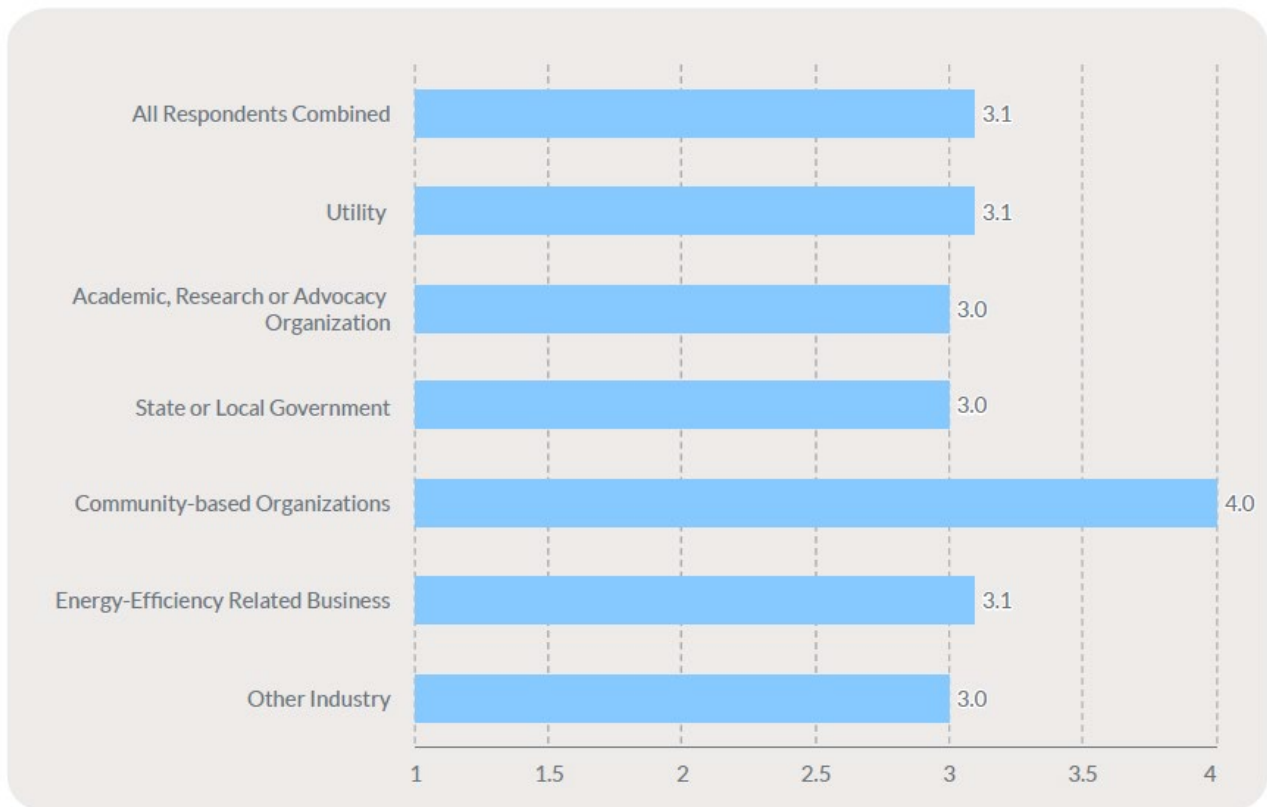
Evaluation of MEEA's Events

Respondents were asked to rate MEEA's events, meetings, workshops, trainings and conference programming. More specifically, they were asked to report how valuable these events have been in helping them understand the issues within DEI.
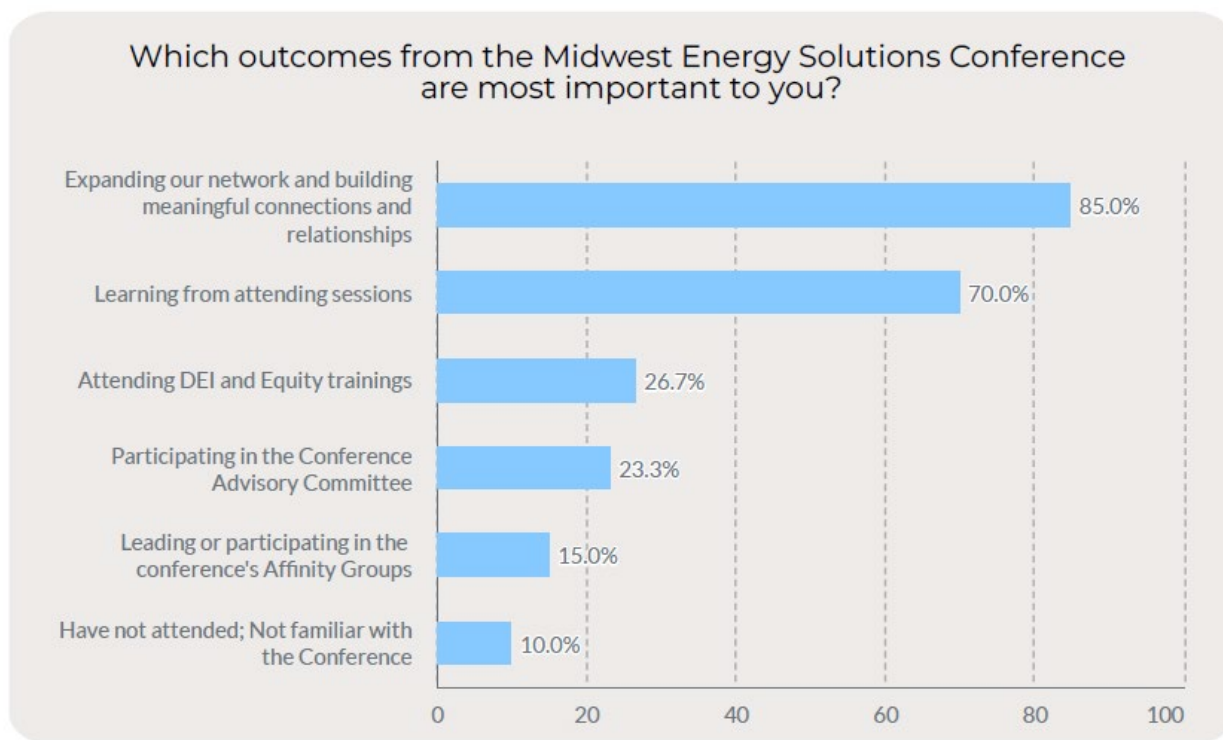
They indicated their answers using the following scale:
(1) Not valuable at all;
(2) Not very valuable;
(3) Somewhat valuable;
(4) Very valuable.

Approximately 16% of respondents said they have not attended any events. Evaluations provided by the remaining 84% of respondents are presented in the chart below and indicate that this is a possible area of focus for MEEA's DEI committee.
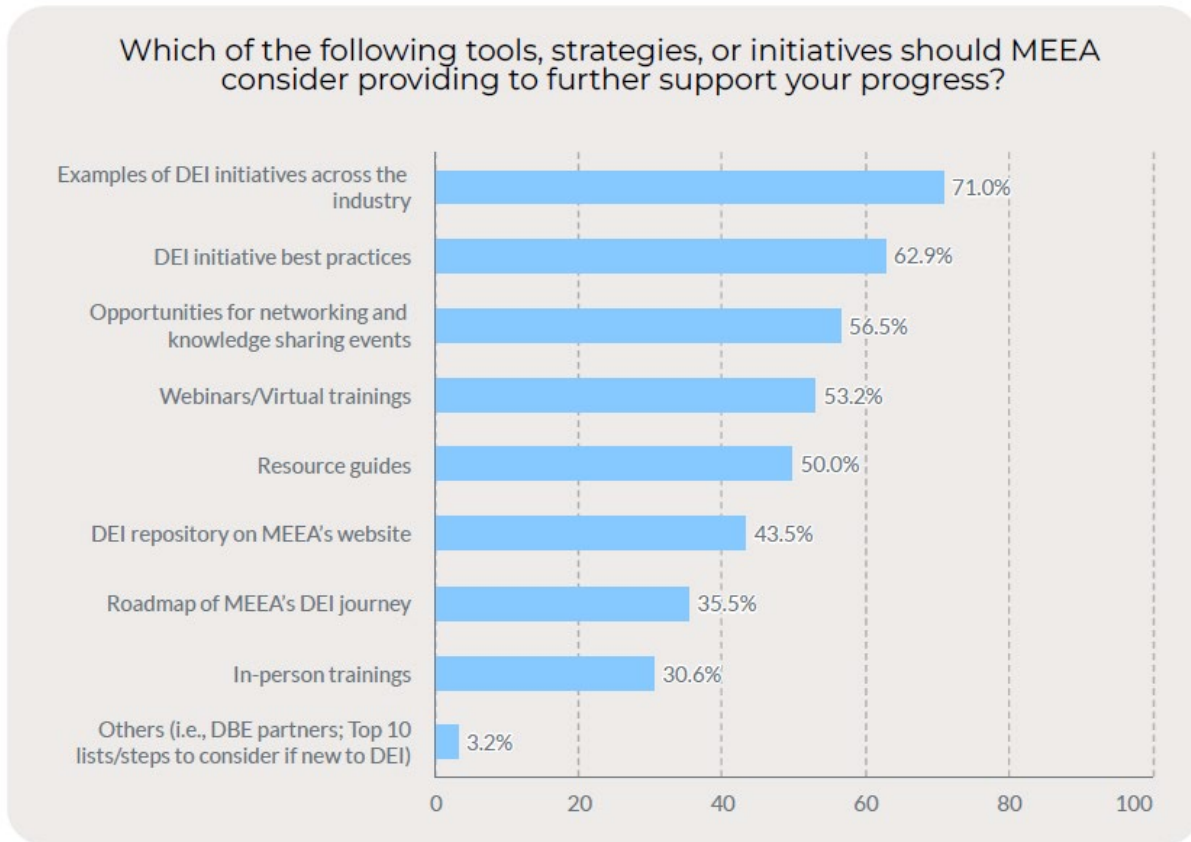
Outcomes

Respondents were asked to rate the outcomes of MEEA's Midwest Energy Solutions Conference in terms of importance. Similar to past post-conference surveys, attendees attend our Conference to expand their EE-related community and learn from our educational sessions. We were interested to see where DEI trainings landed in attendee priorities. We will continue to offer those while attendees find value.

Which outcomes from the Midwest Energy Solutions Conference are most important to you?

Outcome	%
Expanding our network and building meaningful connections and relationships	85.0%
Learning from attending sessions	70.0%
Attending DEI and Equity trainings	26.7%
Participating in the Conference Advisory Committee	23.3%
Leading or participating in the conference's Affinity Groups	15.0%
Have not attended; Not familiar with the Conference	10.0%

	Utility	Academic, Research, Advocacy	State/Local Government	Community-Based Organizations	Energy-Efficient Related Business	Other Industries
Expanding our network...	67%	83%	50%	100%	91%	100%
Learning from attending sessions	17%	83%	50%	50%	75%	50%
Attending trainings	25%	0%	50%	50%	22%	67%
Participating in the CAC	33%	0%	50%	0%	25%	17%
Leading or participating in Affinity Groups	17%	0%	50%	0%	16%	50%
Have not attended; Not familiar	25%	17%	50%	0%	3%	0%

Recommendations

Survey respondents provided terrific input into areas where MEEA can focus future DEI-related initiatives to further our strategic priorities and add value to our industry. Those responses are represented below and will be the focus of our DEI committee moving forward.

Which of the following tools, strategies, or initiatives should MEEA consider providing to further support your progress?

Tool/Strategy/Initiative	Percentage
Examples of DEI initiatives across the industry	71.0%
DEI initiative best practices	62.9%
Opportunities for networking and knowledge sharing events	56.5%
Webinars/Virtual trainings	53.2%
Resource guides	50.0%
DEI repository on MEEA's website	43.5%
Roadmap of MEEA's DEI journey	35.5%
In-person trainings	30.6%
Others (i.e., DBE partners; Top 10 lists/steps to consider if new to DEI)	3.2%

	Utility	Academic, Research, Advocacy	State/Local Government	Community-Based Organizations	Energy-Efficient Related Business	Other Industries
Examples of DEI...	58%	83%	50%	50%	71%	100%
DEI initiative best practices	75%	17%	100%	0%	67%	67%
Opportunities for networking	67%	100%	100%	50%	44%	50%
Webinars/Virtual trainings	58%	50%	50%	50%	56%	33%
Resource guides	58%	17%	50%	50%	50%	67%
DEI repository	33%	50%	100%	50%	44%	33%

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Roadmap of MEEA's DEI journey	33%	67%	50%	50%	29%	33%
In-person trainings	42%	17%	50%	0%	32%	17%
Other	0%	0%	0%	0%	6%	0%

Analysis of Comments

A textual analysis of free-form comments submitted across all audit questions surfaced a number of themes, a few of which represent opportunities for MEEA. These themes are outlined below.

1. A Positive View of DEI

- Overall, the comments reflected a positive view regarding diversity, equity and inclusion. Respondents in general see value for their own organizations as well as addressing some of the issues of disparity within the industry.
- There were also, of course, comments that reflected a degree of caution, hesitance and even a little skepticism about the value of DEI. At one extreme, these feelings came from organizations who were in the very early stages of considering whether or not DEI fit into the work that they do and their organizational direction.
- At the other extreme, organizations who are addressing racial equity ran into a "data barrier." This emerges when either the data to understand the source of disparity is unavailable, or within organizations, much of that data is held within the human resources department and related to specific personnel limiting access for DEI committees.

2. Sense of Pride in their DEI Journey

- Although the respondent organizations are in very different places in their DEI-related efforts, there was an overall sense of pride that the journey had begun. This showed up in terms of their own organization's efforts as well as excitement about the role that MEEA is playing in advancing efforts to address disparity.

3. Opportunities for MEEA to Provide Thought Leadership

- This appears to be the most significant opportunity for MEEA. The direction of many comments identified areas where member organizations need greater insight, support, resources and guidance on how to go about the next steps in their approach to DEI.
- Support in recruiting as well as retaining a diverse workforce was a major area of interest. The common issue is not being able to find candidates with the special skills required within the energy field. As far as recruiting within the BIPOC (Black, Indigenous & People of Color) community is concerned, thought leadership could be applied to helping member organizations recognize and access other pools of talent such as the STEM (science,

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technology, engineering, mathematics) programs within HBCUs (historically Black colleges and universities) and the use of CO-OP (co-operative) programs to connect with these high potential candidates very early on in their educational process.

- Thought leadership and retention would be especially valuable in helping member organizations sort out the subtle distinctions between "equity" and "inclusion." Addressing retention through an equity approach can be confusing since issues of inclusion have more to do with perceptions and attitudes about the sense of belonging and acceptance within the workplace, rather than access to the workplace.

4. MEEA Should Share More About What They Are Doing

- There was a clear thread of interest throughout the comments on getting more information and insights in terms of what MEEA is doing, how we are doing it and how well it is going.
- As mentioned, respondents echoed the importance of having tools and resources to address the issues and concerns that make it hard for them to make progress in their DEI efforts. This means that some of the struggles and difficult questions that MEEA has grappled with become equally as valuable as answers to critical questions.
- The tone of this kind of sharing can reflect a sense of MEEA's "partnership" with its members in the DEI journey which may have the effect of galvanizing relationships and stirring up increased interest in what MEEA has to offer as well.

Conclusion

The input shared above is invaluable to helping MEEA achieve our strategic goals and ensuring that we continue to make a difference in the Midwest energy efficiency industry. With this information, we will be digging in and figuring out a path forward on how we can best make change.

Additionally, we are able to benchmark our impact and the industry's feelings toward and work in DEI-related areas. We will continue to engage our DEI committee, our members and our staff with this data and continue to move our organization forward and make an impact.

MEEA thanks LeRoy Thompson and Thompson & Associates, and everyone that took the time to respond thoughtfully to this. MEEA also thanks our members for supporting our work, so we can continue to evolve and offer valuable resources to the larger industry.