

STATE OF ILLINOIS
REQUEST FOR QUALIFICATIONS
ILLINOIS POWER AGENCY
PROFESSIONAL SERVICES—ILLINOIS SOLAR FOR ALL PROGRAM ADMINISTRATION
Reference Number 23-RFQ-01

The Illinois Power Agency (“Agency” or “State”), an independent state agency tasked with developing procurement plans and conducting procurement events to meet the supply requirements of Illinois electric distribution utilities and implementing the state’s renewable energy portfolio standard, is issuing this request for qualifications (“RFQ”) **seeking one or more qualified and responsible expert firms (“Offerors”) to serve as Program Administrator(s) for the Illinois Solar for All Program.**

The Agency welcomes responses from qualified Offerors able and willing to meet the requirements outlined herein. Evaluation of responses to this RFQ will form the basis for determining recipients for one or more Requests for Proposals (“RFP”) to be issued by the Agency which will include more specific requirements related to the duties of the Program Administrator.¹

Information about the Illinois Solar for All Program (“ILSFA”) and the responsibilities of its Program Administrator(s) can be found in 1-56(b) of the Illinois Power Agency Act (20 ILCS 3855) and in the Agency’s Long-Term Renewable Resources Procurement Plan (“LTRRPP” or “Long-Term Plan”).² The current program website can be found at www.illinoissfa.com.

BACKGROUND: Public Act 99-0906 (Future Energy Jobs Act, or “FEJA”), which was enacted into law on December 7, 2016 and became effective on June 1, 2017, amended and expanded the Illinois Renewable Portfolio Standard (“RPS”) by requiring the development of programs for the procurement of renewable energy credits from new photovoltaic systems in addition to the competitive procurement processes traditionally conducted by the Agency.

This included the creation of two programs to incent the development of distributed generation and community solar projects, the Illinois Solar for All Program, and the Adjustable Block Program. The Adjustable Block Program is a market-rate solar incentive program while “[t]he objectives of the Illinois Solar for All Program are to bring photovoltaics to low-income communities in this State in a manner that maximizes the development of new photovoltaic generating facilities, to create a long-term, low-income solar marketplace throughout this State, to integrate, through interaction with stakeholders, with existing energy efficiency initiatives, and to minimize administrative costs.”³

Section 1-56(b) of the IPA Act requires the Agency to “issue a request for qualifications for a third-party program administrator or administrators to administer all or a portion of the Illinois Solar for All Program. The third-party program administrator shall be chosen through a competitive bid process based on selection criteria and requirements developed by the Agency, including, but not limited to, experience in administering income-eligible energy programs and overseeing statewide clean energy or energy efficiency services.”⁴

¹ Pursuant to section 1-56(b) of the Illinois Power Agency Act (20 ILCS 3855) and in the Agency’s Long-Term Renewable Resources Procurement Plan (“LTRRPP” or “Plan”).

² A revised Long-Term Plan was approved by the Illinois Commerce Commission on July 14, 2022. The Agency is currently preparing a final version of that Plan and anticipates publishing it by the end of August, 2022. ILSFA is described primarily in Chapter 8. A copy of that Plan, and the associated Illinois Commerce Commission Docket approving it, can be found at: <https://ipa.illinois.gov/energy-procurement/current-approved-plan.html>.

³ 20 ILCS 3855/1-56(b)(2).

⁴ 20 ILCS 3855/1-56(b)(5).

INTRODUCTION

The Agency selected a Program Administrator for the Illinois Solar for All Program in 2018 for a term up to five years. That five-year term ends on June 30, 2023 and this solicitation represents the first step in the process of retaining Illinois Solar for All Program Administrator(s) to implement, administer, and operate the program after the conclusion of that term. Upon completion of the solicitation evaluation process, Offerors rated as qualified by the Agency will receive a subsequent Request for Proposals. If selected through the RFP process, the selected Offeror(s) will be expected to enter into a binding contract with the Agency. This RFQ/RFP is exempt from the procedures in the State of Illinois Procurement Code pursuant to Section 1-56(b)(2)(f) of the Illinois Power Agency Act (20 ILCS 3855/1-56(b)(2)(f)) and contains alternative bidding procedures pursuant to Section 20-10(i) of the Illinois Procurement Code (30 ILCS 500/20-10(i)).

On September 14, 2021, Governor Pritzker signed Public Act 102-0662 (colloquially known as the Climate and Equitable Jobs Act or CEJA), that contained significant revisions to Illinois energy policy, including changes to the Illinois Solar for All Program. Among those changes are new provisions for consideration of energy sovereignty, an increased focus on support for small and emerging businesses, expanded requirements related to job training. On March 21, 2022, the Agency filed for approval with the Illinois Commerce Commission a 2022 Long-Term Renewable Resources Procurement Plan, and it was approved on July 14, 2022. That Plan includes updates to the program to comply with the new provisions of CEJA, and other updates to the program design, including new pilot programs designed to increase participation for income-eligible single-family homes.

This solicitation is only for the administration of the Illinois Solar for All Program. The Agency completed the process of selecting a new Program Administrator for the Adjustable Block Program in April 2022 through a similar process contained in 22-RFQ-01 and 22-RFP-01.

PROGRAM STATUS: May 31, 2022 marked the end of the 2021-2022 Program Year (also sometimes noted as PY22 or PY4). In the first four years, Illinois Solar for All has approved over 330 projects, totaling over \$96 million in incentives to build 37 MW of solar. The Income-eligible residential solar incentive sub-programs have not met budget allocations, and have rolled over unallocated budgets, but development of 1-4 unit residential distributed generation projects have increased, with 153 small projects served in the 2021-2022 Program Year, which represents an almost threefold increase from the previous year. The Agency believes as many as 1,000 residential projects a year could be funded each year with current allocations. The income-eligible community solar and Non-profits and Public Facilities sub-programs have traditionally had sufficient project submission to fill available budget allocations, and project selection protocols have been used to rank and select projects based on characteristics prioritized within ILSFA. Budgets expanded by CEJA were implemented beginning with the 2021-2022 Program Year, which served six community solar projects and 43 Non-profit and Public Facility projects, which should be relatively representative of future sub-program capacities.

BRIEF DESCRIPTION: The Agency seeks third-party Program Administrator(s) to administer all or a portion of the Illinois Solar for All Program. The Program Administrator(s) will not be responsible for the Adjustable Block Program, or for the competitive procurements conducted by the Agency through its separate third-party Procurement Administrator.⁵

⁵ See LTRRPP Chapter 5 for a description of Competitive Procurements; Chapter 7 for a description of the Adjustable Block Program, and Chapter 8 for a description of the Illinois Solar for All Program.

INTRODUCTION

Offerors must meet the minimum qualifications listed below:

- A. Experience in administering income-eligible energy programs and overseeing statewide clean energy or energy efficiency services.
- B. Expertise in administering programs that serve one or both of the following markets:
 - a. Income-eligible residential housing
 - b. Non-profit and Public facilities
- C. Experience working with income-eligible and/or environmental justice communities.
- D. A demonstrated track record of successful incorporation of diversity, equity, and inclusion activities into program design and implementation.
- E. Experience tracking Key Performance Indicators and demonstrated ability to provide reporting of qualitative analysis of program results.
- F. Expertise in the practice of consumer protection measures.
- G. Expertise in consumer complaint management and resolution.
- H. Adequate legal resources to assist in the prevention and resolution of issues.
- I. Expertise in writing manuals, procedures, protocols, and internal and external communications.
- J. Technical expertise (i.e., engineering) in the design and installation of photovoltaic systems.
- K. Expertise in project management.
- L. Expertise in data management and reporting.
- M. Expertise in website/portal design and ongoing management.
- N. Adequate resources to perform and fulfill the required functions and responsibilities.
- O. The absence of a conflict of interest and inappropriate bias for or against potential program participants or the affected electric utilities.

The Agency intends to identify Offerors that can provide administrative functions for the Illinois Solar for All Program as identified in the Agency's LTRRPP.

It is expected that the contract resulting from this solicitation and any subsequent RFP with the awarded Offeror shall have a term of up to five (5) full years plus a period for start-up/transition. The contract is expected to have an initial term of the transition period plus two years, and years three through five will be offered on an annual renewal basis.⁶

Please read the entire solicitation package and submit a Submittal of Qualifications in accordance with the instructions. All forms and signature areas contained in the submittal package must be completed in full and submitted with the technical proposal, and indicative price quotes, which combined will constitute the Submittal. Do not submit the instructions pages with offers. Offerors should retain the Instructions and a copy of the Submittal of Qualifications for future reference.

⁶ For example, if the Offeror's contract starts March 1, 2023, the initial contract term would be the transition period of March 1 through June 30, 2023, and then the period July 1, 2023 through June 30, 2025. The periods July 1, 2025 through June 30, 2026, July 1, 2026 through June 30, 2027, and July 1, 2027 through June 30, 2028 would be contracted through annual contract renewals at the discretion of the Agency.

SOLICITATION OUTLINE

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INSTRUCTIONS FOR SUBMITTING QUALIFICATIONS

- I.1 HOW TO ENTER INFORMATION:** Type information in the text fields provided. Text fields are indicated by the instruction “Click here to enter text.” in red font. If the information requested does not apply to the Offeror, then enter “N/A” into the text field. Please enter the requested information or N/A into every red text field. If appropriate, provide a brief explanation of why the field is not applicable.
- I.2 PUBLISHED PROCUREMENT INFORMATION:** Although this solicitation is exempt from the Illinois Procurement Code, the Agency will use State websites, in addition to other resources, to disseminate information about this solicitation. The State publishes procurement information, including updates, on the Illinois Procurement Bulletin (www.bidbuy.illinois.gov), Illinois Public Higher Education Procurement Bulletin (www.procure.stateuniv.state.il.us/), Transportation Procurement Bulletin (idot.illinois.gov/doing-business/procurements/) or the Illinois Capital Development Board Bulletin (www2.illinois.gov/cdb/procurement/Pages/default.aspx), (collectively and individually referred to as “Bulletin”). The Agency will also post this solicitation and related documents and announcements to its website (ipa.illinois.gov). Procurement information may not be available in any other form or location. Offeror is responsible for monitoring the Bulletin selected by the Agency for this procurement. The Agency will not be held responsible if Offeror fails to receive the optional e-mail notices.
- I.3 SOLICITATION CONTACT:** The individual listed below shall be the single point of contact for this solicitation. Unless otherwise directed, Offerors should only communicate with the Solicitation Contact. The Agency shall not be held responsible for information provided to or from any other person.

Solicitation Contact: Sanjay Patel	Phone: 312-814-1355
Agency: Illinois Power Agency	Fax: 312-814-0926
Street Address: 105 W. Madison St, Suite 1401	TDD: 866-846-5276
City, State Zip: Chicago, IL 60602	
Email: sanjay.patel@illinois.gov	

Questions or comments regarding this RFQ should be timely directed in writing to the Solicitation Contact identified above. Do not discuss the solicitation or any qualification, directly or indirectly, with any State officer or employee other than the Solicitation Contact.

- I.4 OFFEROR QUESTIONS AND AGENCY RESPONSE:** All questions, other than those raised at any Offeror conference call, that pertain to this solicitation must be submitted in written form and submitted to the Solicitation Contact no later than August 22, 2022. Questions received and

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Agency responses may be posted as an Addendum to the original solicitation on the Bulletin; only these written answers to questions shall be binding on the Agency. Offerors are responsible for monitoring the Bulletin.

- I.5 SUBMISSION DUE DATE, TIME, AND ADDRESS FOR SUBMISSION:** Submittal of qualifications shall be directed to the address provided below and shall be received no later than the Submittal Due Date & Time specified below.

Submittal due Date & Time:

Date: September 9, 2022

Time: 5:00 pm CPT

Submit/Deliver Submittals To:

Agency: Illinois Power Agency
Attn: Sanjay Patel
Address: 105 W Madison Street, Suite 1401
City, State Zip: Chicago, IL 60602
Solicitation Title & Reference # Request for Qualifications – Illinois Solar for All Program Administrator, 23-RFQ-01 Offeror Name: _____

(If submitting in hard copy, place label containing information above outside of sealed envelope/container)

- I.6 INSTRUCTIONS FOR SUBMISSION OF QUALIFICATIONS:** Responses to this RFQ must be submitted either:

(1) By e-mail sent to the e-mail address listed above. The e-mail should have a subject line with the Solicitation title, and Offeror's name. The e-mail should contain as attachments (in PDF or Word format): Section 1 – Submittal of Qualifications Check List; Section 2 – Technical Proposal.

(2) As a single sealed envelope/container clearly labeled with the Solicitation title, and Offeror's name delivered to the address listed above. One original and one electronic copy (USB drive or CD) of the Submittal of Qualifications package must be provided. The package shall contain the following two sections: Section 1 – Submittal of Qualifications Check List; Section 2 – Technical Proposal.

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- I.7 GOVERNING LAW AND FORUM:** Illinois law and rule govern this solicitation and any resulting contract. Offeror must bring any action relating to this solicitation or any resulting contract in the appropriate court in Illinois. This document contains statutory references to the Illinois Compiled Statutes designated with "ILCS". Vendor may view the full text at (www.ilga.gov/legislation/ilcs/ilcs.asp). Section 1-56(b) of the Illinois Power Agency Act (20 ILCS 3855/1-56(b)) is applicable to this solicitation.
- I.8 PUBLIC RECORDS AND REQUESTS FOR CONFIDENTIAL TREATMENT:** Submittals of Qualifications become the property of the Agency. Submittals of Qualifications, including late submissions, will not be returned. All submittals will be open to the public under the Illinois Freedom of Information Act (FOIA) (5 ILCS 140) and other applicable laws and rules, unless Offeror requests in its submittal that the Agency treat certain information as confidential. A request for confidential treatment will not supersede the State's legal obligations under FOIA. The Agency will not honor requests to keep entire submittals confidential. Offerors must show the specific grounds in FOIA or other law or rule that support confidential treatment. Regardless, the Agency will disclose the successful Offeror's name and the substance of the submittal upon final contract award. If Offeror requests confidential treatment, Offeror must submit one additional copy of the Submittal of Qualifications with proposed confidential information redacted. This redacted copy must describe the general nature of the material removed and shall retain as much of the Submittal of Qualifications as possible. In a separate attachment, Offeror shall supply a listing of the provisions identified by section number for which it seeks confidential treatment and identify the statutory basis under Illinois law and include a detailed justification for exempting the information from public disclosure. Offeror will hold harmless and indemnify the Agency for all costs or damages associated with the Agency defending Offeror's request for confidential treatment. Offeror agrees the Agency may copy the Submittal of Qualifications to facilitate evaluation, or to respond to requests for public records. Offeror warrants that such copying will not violate the rights of any third party.
- I.9 RESERVATIONS:** Offeror must read and understand the solicitation and tailor the Submittal of Qualifications and all activities to ensure compliance. The Agency reserves the right to amend the solicitation, reject any or all submittals, cancel the solicitation, and waive minor defects. The Agency may request a clarification, inspect Offeror's premises, interview staff, request a presentation, or otherwise verify the contents of the submittal, including information about subcontractors and suppliers. The Agency will make all decisions on compliance, evaluation, terms and conditions, and shall make decisions in the best interests of the Agency and in accordance with rules and other applicable state and federal statutes and regulations. This competitive process may require that Offeror provide additional information and otherwise cooperate with the Agency. If an Offeror does not comply with requests for information and cooperate, the Agency may reject the Submittal of Qualifications as non-responsive to the solicitation. Submitting a Submittal of Qualifications does not entitle Offeror to an award or a contract. Posting Offeror's name in a Bulletin notice does not entitle Offeror to a contract. The Agency is not responsible for and will not pay any costs associated with the preparation and submission of any Submittal of Qualifications. Short-listed Offeror(s) for contract award shall not commence and will not be paid for any billable work prior to the date all parties execute the contract.
- I.10 AWARD:** The Agency is not obligated to award a contract pursuant to this solicitation. This solicitation and any subsequent RFP issuance, selection and award process will follow the process

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outlined in Section 1-56(b)(5) of the Illinois Power Agency Act (20 ILCS 3855/1-56(b)(5)). As a result of this solicitation and any subsequent RFP, the Agency may select the winning Offeror based on the winning proposal and may award a contract for up to a five-year term (plus an applicable transition period as described in above in the Background Section). If the Agency issues an award as the result of this solicitation and any subsequent RFP, the award will be made to the Responsible Offeror who best meets the specified requirements of this solicitation and any subsequent RFP. The approval of any contract resulting from the RFP will be subject to approval by the Illinois Commerce Commission, as required by Section 16-111.5(b)(5) of the Illinois Public Utilities Act (220 ILCS 5).

- I.11 INCORPORATION OF 23-RFQ-01 BY REFERENCE:** This solicitation (23-RFQ-01) and Offeror's Submittal of Qualifications will be incorporated and made part of any subsequent contract by reference.
- I.12 PREQUALIFICATION TO RESPOND TO SUBSEQUENT RFP:** Based on the evaluation of responses and approval process described in this solicitation, qualified Offerors will be invited to respond to the subsequent RFP.
- I.13 EVALUATION PROCESS:** The Agency determines how satisfactorily submittals meet the Responsiveness and Responsibility requirements. Submittals that fail to meet minimum Responsiveness and Responsibility requirements will not be considered for subsequent evaluation. The Agency considers the information provided when evaluating submittals. If the Agency finds a failure or deficiency, the Agency may reject the submittal or reflect the failure or deficiency in the evaluation.

RESPONSIVENESS: A responsive Offeror is one whose submittal conforms in all material respects to this solicitation and includes all required information. The Agency will determine whether the submittal conforms in all material respects to this solicitation. Minor differences or deviations that have negligible impact on the suitability of the Offeror to meet the Agency's needs may be accepted or corrections allowed. The Agency will determine whether Offeror's Submittal of Qualifications complies with the instructions for submitting qualifications. Except for late submissions, the Agency may require that an Offeror correct deficiencies as a condition of further evaluation.

RESPONSIBILITY: A responsible Offeror is one who has the expertise, experience, qualifications, and capability in all respects to perform fully the requirements stated on this solicitation and who has the reputation, integrity and reliability that will assure good faith performance. The Agency determines whether the Offeror is a "Responsible" Offeror. The Agency may additionally consider the following:

A "prohibited bidder" includes a person assisting the Agency in determining whether there is a need for contract, unless such information was part of a response to a publicly issued Request for Information. Additionally, a person who assisted the Agency by reviewing, drafting or preparing this solicitation, a Request for Proposal or Request for Information or who provided similar assistance is deemed a prohibited bidder.

Other factors that the Agency may evaluate to determine Responsibility (including those found outside the Submittal of Qualifications) include, but are not limited to: political

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contributions, certifications, conflict of interest, financial disclosures, past performance in business or industry, references, compliance with applicable laws, financial responsibility, insurability, effective equal opportunity compliance, and payment of prevailing wages if required by law.

CRITERIA FOR EVALUATION OF RESPONSIBILITY: The table below shows the minimum elements of expertise, skills, experience and qualifications.

Expertise, Skills, Experience and Qualifications Requirements
A. Experience in administering income-eligible energy programs and overseeing statewide clean energy or energy efficiency services
B. Expertise in administering programs that serve one or both of the following markets: a. Income-eligible residential housing b. Non-profits and Public facilities
C. Experience working with income-eligible and/or environmental justice communities
D. A demonstrated track record of successful incorporation of diversity, equity, and inclusion activities into program design and implementation.
E. Experience tracking Key Performance Indicators and demonstrated ability to provide reporting of qualitative analysis of program results.
F. Expertise in the practice of consumer protection and measures.
G. Expertise in consumer complaint management and resolution.
H. Adequate legal resources to assist in the prevention and resolution of issues.
I. Expertise in writing manuals, procedures, protocols, and internal and external communications.
J. Technical expertise (i.e., engineering) in the design and installation of photovoltaic systems.
K. Expertise in project management.
L. Expertise in data management and reporting.
M. Expertise in website/portal design and ongoing management.
N. Adequate resources to perform and fulfill the required functions and responsibilities.
O. The absence of a conflict of interest and inappropriate bias for or against potential program participants or the affected electric utilities

I.14 SELECTION OF OFFERORS: The Agency will select the Responsive and Responsible Offerors who meet the threshold requirements listed in the above evaluation.

Those Responsive and Responsible Offerors that meet threshold criteria will be placed on a short list of pre-qualified Offerors and invited to submit a response to the RFP. Only RFP responses from pre-qualified Offerors will be accepted by the Agency.

The IPA will determine whether each offeror is Qualified or Not Qualified. Any offeror that receives a rating of Not Qualified may request, within 3 business days of receiving notice of such

SECTION 1 - SUBMITTAL OF QUALIFICATIONS CHECK LIST

rating, information from the IPA regarding the criteria for which that response did not satisfy Agency needs. Within 7 days of receiving that information from the IPA, the offeror may supply any clarifications that it believes might address the deficiencies identified by the Agency. The Agency will make a final determination of qualification based on that information.

I.15 MINORITY, FEMALE, AND PERSONS WITH DISABILITY PARTICIPATION AND UTILIZATION PLAN:

Any subsequent RFP solicitation is expected to contain a 30% goal to include businesses owned and controlled by minorities, females, and persons with disabilities in the State's procurement and contracting processes.

The Agency takes this goal very seriously, and failure to submit a Utilization Plan⁷ that meets this goal in response to any subsequent RFP as instructed in such solicitation will render the offer non-responsive and thus will be summarily rejected by the Agency. The Illinois Department of Central Management Services certifies minority-owned, women-owned, and persons with disabilities owned businesses for the State of Illinois Business Enterprise Program ("BEP"). For complete requirements for BEP certification please refer to:

www2.illinois.gov/cms/business/sell2/bep/Pages/default.aspx.

A primer video on completing a utilization plan can be found at: <https://youtu.be/j9jXidHR7-U>

The Utilization Plan is not required as part of the response to this RFQ. It will be a component of any subsequent RFP.

If the Offeror is a BEP certified vendor, the entire goal is met and no subcontracting with a BEP certified vendor is required; however, Offeror must submit a Utilization Plan indicating that the goal will be met by self-performance.

I.16 SUBCONTRACTING: Subcontractors are allowed. For the purposes of this section, subcontractors are those specifically hired to perform all or part of the work that is the subject of this solicitation. If subcontractors are to be utilized, in preparation to any subsequent RFP, offerors must identify subcontractors with an annual value of more than \$50,000 and the expected amount of money each will receive under the contract.

I.17 TIMELINE:

- RFQ Issued: August 8, 2022
- RFQ Offerors Conference Call: August 19, 2022, 2 PM CPT⁸
- RFQ Offerors Questions Due: August 22, 2022, 5 PM CPT
- RFQ Responses due: September 9, 2022, 5:00 PM CPT
- Offerors notified of eligibility: October 3, 2022 (tentative)
- RFP Issued: November 4, 2022 (tentative)
- RFP Responses Due: December 23, 2022 (tentative)
- Award made (subject to ICC approval): February 10, 2023 (tentative)

⁷ See:

www2.illinois.gov/cpo/general/Documents/Utilization%20Plan%20Version%202021.0%20%283.17.2021%29.pdf for an illustrative example of the Utilization Plan.

⁸ Please send an email to the Solicitation Contact listed above to request the call-in number for this call.

SECTION 1 - SUBMITTAL OF QUALIFICATIONS CHECK LIST

- Contract start date: March 1, 2023 (tentative)

SUBMITTAL OF QUALIFICATIONS CHECK LIST

By completing and signing this form, the Offeror makes a Submittal of Qualifications to the Agency that the Agency may accept. Offeror should also use this form as a final check to ensure that all required documents are completed and included with the submittal. Offeror must mark each blank below as appropriate. Offeror understands that failure to meet all requirements is cause for disqualification.

CHECK LIST:

- 1.1. SOLICITATION REVIEW:** Offeror reviewed the solicitation, including all referenced documents, laws, and instructions, completed all blanks, provided all required information, and demonstrated how it will meet the requirements of the Agency.
 Yes No
- 1.2. INCORPORATION OF 23-RFQ-01 BY REFERENCE:** Offeror acknowledges that this solicitation (**23-RFQ-01**) and Offeror's responses to it will be incorporated and made part of any subsequent contract by reference.
 Yes No
- 1.3. ADDENDA:** Offeror acknowledges receipt of any and all addendums to this solicitation and has taken those into account in making this Submittal of Qualifications.
 Yes No
- 1.4. SUBMISSION OF QUALIFICATIONS - Section 2:** Offeror is submitting a complete and responsive statement of qualifications, in a properly labeled container, to the correct location, and by the due date and time.
 Yes No
- 1.5. EXPERTISE, EXPERIENCE AND STAFF:** Offeror has the required expertise, skill, experience staff, and ability to meet the requirements of the Agency in Section 2.2 through Section 2.5.
 Yes No
- 1.6. MILESTONES AND DELIVERABLES:** Offeror has the capability to meet the Agency's milestones and deliverables requirements in sections 2.2 and 2.3.
 Yes No
- 1.7. OFFEROR STATEMENT OF QUALIFICATIONS:** Offeror has provided a complete statement of qualifications in Sections 2.5 and 2.6.
 Yes No
- 1.8. SIGNATURE OF AUTHORIZED REPRESENTATIVE:** The undersigned authorized representative of the identified Offeror hereby submits this Submittal of Qualifications in full compliance with this solicitation.

Signature of Authorized Representative: _____

Printed Name of Signatory: [Click here to enter text.](#)

SECTION 1 - SUBMITTAL OF QUALIFICATIONS CHECK LIST

Date: [Click here to enter a date.](#)

Section 2 - Technical Proposal

- 2.1. GOAL:** The Agency seeks a qualified Program Administrator or Administrators. The Program Administrator(s) will assist the Agency in meeting its mission to carry out the objectives of the Illinois Solar for All Program in accordance with Section 1-56(b)(2) of the Illinois Power Agency Act.
- 2.2. EXPERTISE, EXPERIENCE AND SERVICES REQUIRED:** The Agency requires services from qualified Offerors that, at a minimum, have the following experience and qualifications.
- A. Experience in administering income-eligible energy programs and overseeing statewide clean energy or energy efficiency services
 - B. Expertise in administering programs that serve one or both of the following markets:
 - a. Income-eligible residential housing
 - b. Public and non-profit facilities
 - C. Experience working with income-eligible and/or environmental justice communities
 - D. A demonstrated track record of successful incorporation of diversity, equity, and inclusion activities into program design and implementation.
 - E. Expertise in tracking Key Performance Indicators and demonstrated ability to provide reporting of qualitative analysis of program results.
 - F. Expertise in the practice of consumer protection measures.
 - G. Expertise in consumer complaint management and resolution.
 - H. Adequate legal resources to assist in the prevention and resolution of issues.
 - I. Expertise in writing manuals, procedures, protocols, and internal and external communications.
 - J. Technical expertise (i.e., engineering) in the design and installation of photovoltaic systems.
 - K. Expertise in project management.
 - L. Expertise in data management and reporting.
 - M. Expertise in website/portal design and ongoing management.
 - N. Adequate resources to perform and fulfill the required functions and responsibilities
 - O. The absence of a conflict of interest and inappropriate bias for or against potential program participants or the affected electric utilities

The Program Administrator(s), with input from the Agency, will be required to complete, at minimum, the following ongoing tasks (as applicable) to ensure compliant administration of the Illinois for Solar Program, pursuant to Section 1-56(b)(2) of the Illinois Power Agency Act and the Agency's Long-Term Renewable Resources Procurement Plan.

- Ongoing Program planning, internal coordination and management including coordination of operations of the Program with the Administrator of the Adjustable Block Program as necessary.
- Process applications and verify project eligibility in Illinois Solar for All and coordinate this information with the Adjustable Block Program Administrator (who will process the actual generation of contracts). This includes, but is not limited to, review of project technical specifications, income verification, coordination execution by Approved Vendors and utilities or the IPA, review of community involvement in projects, review of job training coordination, and review of Illinois Solar for All consumer protections such as verification of ensuring

Section 2 - Technical Proposal

tangible economic benefits flow to income-eligible participants. Illinois Solar for All administrative procedures will be as similar to those of the Adjustable Block Program to the extent possible, to reduce administrative burden on Approved Vendors who participate in both programs.

- Act as the centralized source for income verification and maintain database of program participants.
- Assist in the development of contracts, disclosure forms, and brochures for use by Illinois Solar for All Approved Vendors and their partner community-based organizations. Review Approved Vendor marketing materials, monitor social media for misinformation, assist in the resolution of issues related to Approved Vendor marketing; and report activity to the Agency regularly. Development of newsletters and announcement text and review and editing of program materials, including the Approved Vendor Manual.
- Coordinate Grassroots Education efforts by performing a Request for Proposals process for campaigns, contract preparation, facilitating onboarding, training selected organizations, ongoing support and assistance in development of strategies to achieve campaign goals, and regular related metrics reporting.
- Track, resolve, and report participant complaints.
- Review Annual Reports submitted by Approved Vendors.
- Ongoing monitoring of project development status and verify completion of projects and the processing of approvals for payments, as well as conducting on-site inspections for quality assurance purposes
- Facilitate Illinois Solar for All Approved Vendors meeting the additional requirements of the Illinois Solar for All Program. In particular, the Program Administrator will act as a liaison between Illinois Solar for All Approved Vendors participating in the programs and organizations providing job training. The Program Administrator will also work to inform Illinois Solar for All Approved Vendors of energy efficiency, weatherization, lead abatement, and other program opportunities that could provide additional benefits to participants.
- Provide guidance and education to Illinois Solar for All Approved Vendors, community groups, local government agencies, and others on how to leverage other governmental policies to facilitate income-eligible solar projects and energy efficiency programs. Other relevant policies include affordable housing, economic development, public finance, and tax policies, at the federal, state, and local level. The Administrator will act as liaison with other governmental agencies that administer such programs to facilitate their use on solar development.
- Provide Program Manual and related materials for use by Illinois Solar for All Approved Vendors.

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- Provide reports to the Agency and the Commission on a quarterly basis on the status of the Program including, but not limited to, number of applications received, number of applications approved, number of projects completed, REC payments, payments for and status of grassroots education efforts (if applicable), and a summary of technical assistance provided.
- Facilitate “placement for graduates of Illinois-based renewable energy-specific job training programs, including the Clean Jobs Workforce Network Program and the Illinois Climate Works Pre-apprenticeship Program administered by the Department of Commerce and Economic Opportunity, along with other programs administered under Section 16-108.12 of the Public Utilities Act.”
- “[D]evelop a web-based clearinghouse for information available to both job training program graduates and firms participating, directly or indirectly, in Illinois solar incentive programs.”⁹
- “[C]oordinate ... activities with entities implementing electric and natural gas income-qualified energy efficiency programs, including customer referrals to and from such programs, and connecting prospective low-income solar customers with any existing deferred maintenance programs where applicable.”¹⁰
- Assist the Agency with ongoing stakeholder involvement and communications, including, but not limited to, development of the list of environmental justice communities, evaluation plans, review and changes to program design and REC prices.
- Assist the Agency to ensure small and emerging businesses¹¹, particularly those located in income-eligible and environmental justice communities, are able to participate in the Illinois Solar for All Program.
- Assist the Agency in supporting projects that promote energy sovereignty¹² to meet program goals. Provide resources to developers and potential participants Track ongoing ownership of energy sovereignty projects to ensure adherence to contract terms.
- Assist the Agency to develop and implement special initiatives to promote program participation, including the Pilot Program on Home Repairs and Upgrades and the Program Delivery Pilot.

This set of tasks is based upon the program design for the Illinois Solar for All Program as has been to date as well as new provisions pursuant to the Climate and Equitable Jobs Act and contained in the Long-Term Plan approved by the ICC on July 14, 2022. While the Agency will endeavor to release a final

⁹ 20 ILCS 3855/1-56(b)(5).

¹⁰ *Id.*

¹¹ Refer to LTRRPP Chapter 8 – Illinois Solar for All (p. 228).

¹² Refer to LTRRPP Chapter 8 – Illinois Solar for All (p. 229).

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LTRRPP by the end of August 2022, it will be the responsibility of Offerors to review the LTRRPP as filed and the subsequent ICC Commission Order reviewing that Plan with modifications.¹³

The Program Administrator(s) will also monitor program operations, share program activity with the Agency and its stakeholders, as directed by the Agency, and conduct regularly scheduled meetings to discuss program operations and market conditions. In addition, the Program Administrator(s) will provide ad hoc support and deliverables that, from time to time, may be required to assist the Agency in meeting its statutory mission and regulatory requirements, such as reports or updates that may be required by the Illinois General Assembly or through Orders entered by the Illinois Commerce Commission.

The Illinois Solar for All Program Administrator(s) will also coordinate as needed with the Adjustable Block Program Administrator engaged by the Agency pursuant to Section 1-75(c)(1)(M) of the Act (see Chapters 7 and 8 of the LTRRPP).

In the recently completed 2021 to 2022 Program Year, Illinois Solar for All received 167 applications for residential projects, 69 applications for projects from non-profits and public facilities, and 13 applications for income-eligible community solar projects. The Agency hopes to see a significant increase in residential projects to approximately 1,000 per year, while for planning purposes the level of participation for non-profit/public facility projects and income-eligible community solar projects are reasonable proxies at this time. An Offeror should be prepared to provide services to meet at least this level of activity but also be able to provide a plan and the ability to scale up resources to meet higher levels of program activity.

The Illinois Solar for All Program has also been subject to a third-party evaluation and Offerors are advised to review the evaluation reports and recommendations available at <https://www.illinoissfa.com/evaluation/>.

2.3. MILESTONES AND DELIVERABLES: The successful Offeror will be able to assist the Agency to meet the following expected milestones and deliverables:

2.3.1. Be able to begin the transition of existing program administration functions within 30 days of the award notice.

2.3.2. Be able to complete transitioning program administration within 90 days of the contract start date.

2.3.3. Provide ad hoc support as determined by the Agency from time to time.

2.4. STAFF SPECIFICATIONS: The Offeror must have adequate staff with the necessary skill and experience to perform the requirements specified in Sections 2.2 and Section 2.3 above in a timely and efficient manner. Please include in the Offeror Statement of Qualifications in Section 2.6 a listing and description of key staff that will be used to meet these requirements.

2.5. OFFEROR QUALIFICATIONS: Please refer to Section 2.2 above. For each of the Minimum Requirement items in the table below, state by entering Yes or No whether the offeror meets

¹³ See www.illinoissfa.com for current program implementation and <https://ipa.illinois.gov/energy-procurement/current-approved-plan.html> for information on the Long-Term Plan and ICC approval process.

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the minimum requirement. Failure to meet any of the requirements will automatically disqualify the Offeror.

Minimum expertise, experience skills, and qualifications requirements:

Minimum Expertise, Skills, Experience and Qualifications Requirements	Offeror must state below whether its staff meet each Minimum Requirement by entering Yes or No
A) Experience in administering income-eligible energy programs and overseeing statewide clean energy or energy efficiency services	Click here to enter text.
B) Expertise in one or both of the following markets: a. Income-eligible residential housing b. Non-profits and public facilities Please indicate if the Offeror can both of these markets, or if the Offeror would like to limit its services to only certain markets.	Click here to enter text.
C) Experience working with income-eligible and/or environmental justice communities.	Click here to enter text.
D) A demonstrated track record of successful incorporation of diversity, equity, and inclusion activities into program design and implementation	Click here to enter text.
E) Experience tracking Key Performance Indicators and demonstrated ability to provide reporting of qualitative analysis of program results	Click here to enter text.
F) Expertise in the practice of consumer protection measures.	Click here to enter text.
G) Expertise in consumer complaint and management resolution	Click here to enter text.
H) Adequate legal resources to assist in the prevention and resolution of issues.	Click here to enter text.
I) Expertise in writing manuals, procedures, protocols, and internal and external communications.	Click here to enter text.
J) Technical expertise (i.e., engineering) in the design and installation of photovoltaic systems.	Click here to enter text.

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K) Expertise in project management.	Click here to enter text.
L) Expertise in data management and reporting.	Click here to enter text.
M) Expertise in website/portal design and ongoing management.	Click here to enter text.
N) Adequate resources to perform and fulfill the required functions and responsibilities.	Click here to enter text.
O) The absence of a conflict of interest and inappropriate bias for or against potential program participants or the affected electric utilities.	Click here to enter text.

- 2.6. OFFEROR STATEMENT OF QUALIFICATIONS:** Please describe Offeror's background, experience and qualifications relevant to the role of the Agency's Adjustable Block Program Administrator. Be sure to specifically address **each** of the twelve criteria (A-L) listed in Section 2.5. Please limit the statement of qualifications to no more than twenty (20) pages (not including resumes of key staff). Please do not submit marketing materials. The response to this section may also be included as an attachment to the response.

[Click here to enter text.](#)

- 2.7. Supplemental Information:**

Please provide additional information which may assist the Agency to assess the Offeror's background, experience, qualifications. Limit response to one page. Do not send marketing materials, please.	Click here to enter text.
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Please provide a brief high-level narrative of the Offeror's proposed approach including, but not limited to, sub-contractors/program partners, software platform(s) to be utilized, and how the Offeror would transition operations from the current administrator. Please limit response to two pages.	Click here to enter text.
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<p>Please provide an indicative pricing estimate. The Agency will use this for informational and budget planning purposes only. Indicative pricing estimates are not binding and may be revised during the response to the RFP. Please indicate fixed (annual) costs and variable (e.g., per-project and/or per-batch) costs.</p>	<p>Click here to enter text.</p>

- 2.8. SIGNATURE OF AUTHORIZED REPRESENTATIVE:** The undersigned authorized representative of the identified Offeror hereby submits this Submittal of Qualifications to perform in full compliance with this Solicitation.

Signature of Authorized Representative: _____

Printed Name of Signatory: [Click here to enter text.](#)

Date: [Click here to enter a date.](#)