

STATE OF ILLINOIS  
REQUEST FOR QUALIFICATIONS

ILLINOIS POWER AGENCY  
PROFESSIONAL SERVICES – PROGRAM EVALUATION (ILLINOIS SOLAR FOR ALL)  
Reference Number 25-RFQ-01

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The Illinois Power Agency (“Agency” or “State”) issues this Request for Qualifications (“RFQ”) seeking qualified and responsible experts or expert firms (“Offerors”) **to serve as the independent Evaluator for the Illinois Solar for All Program**. A brief background and description are set forth below. The Agency welcomes responses from qualified Offerors able and willing to meet these requirements. Evaluation of responses to this RFQ will form the basis for determining recipients for a Request for Proposals (“RFP”) that will include more detailed and specific requirements.

**BACKGROUND:** Public Act 99-0906 (colloquially known as the Future Energy Jobs Act), which took effect 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. Those provisions were subsequently further updated by Public Act 102-0662 (colloquially known as the Climate and Equitable Jobs Act) which took effect September 15, 2021. The implementation of these programs is included in the Agency’s Long-Term Renewable Resources Procurement Plan (“Long-Term Plan”).<sup>1</sup>

**One of the programs detailed in the Long-Term Plan is the Illinois Solar for All Program, “which provides incentives for low-income distributed generation and community solar projects, and other associated approved expenditures”<sup>2</sup> Furthermore, “[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.”<sup>3</sup>**

Illinois Solar for All currently consists of four sub-programs:

- Low-income Single-Family and Small Multifamily Solar (Residential Small)
- Low-income Community Solar
- Incentives for Non-profits and Public Facilities
- Low-income large multifamily solar (Residential Large)

Solar projects are supported by contracts to purchase the 15-year output of Renewable Energy Credits (“RECs”) from the participating projects. Illinois Solar for All requires that: 1) residential system hosts or community solar subscribers have an income of no more than 80% of Area Median Income (“AMI”), 2) contracts produce “tangible economic benefits” for participants, 3) 25% of funds are spent in Environmental Justice Communities, 4) 25% of funds are spent for projects that promote energy sovereignty, and 5) up to 5% of the annual budget is set aside for grassroots education funding. The

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<sup>1</sup> See: <https://ipa.illinois.gov/content/dam/soi/en/web/ipa/documents/final-2024-long-term-renewable-resources-procurement-plan-19-apr-2024.pdf> for the current version of the Long-Term Plan.

<sup>2</sup> 20 ILCS 3855/1-56(b)(2).

<sup>3</sup> Ibid.

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current annual budget for the program is approximately \$66.5 million per year. The program also has requirements related to the employment of graduates of job training programs.

The program is currently administered by a third-party program administrator, Elevate Energy (“Program Administrator”).<sup>4</sup> The program launched in 2019 and is in its seventh program year, spanning June 2024 through May 2025. Details can be found on the program website, [www.illinoissfa.com](http://www.illinoissfa.com), in Section 1-56(b)(2) of the Illinois Power Agency Act (20 ILCS 3855), and in Chapter 8 of the Long-Term Plan. The Agency is also running a separate program for non-income qualified distributed generation and community solar, the Adjustable Block Program (also referred to as Illinois Shines).<sup>5</sup> Evaluation of the Illinois Shines Program is not part of this Solicitation.

Section 1-56(b)(6) of the Act specifically requires evaluation of the Illinois Solar for All Program:

*At least every 2 years, the Agency shall select an independent evaluator to review and report on the Illinois Solar for All Program and the performance of the third-party program administrator of the Illinois Solar for All Program. The evaluation shall be based on objective criteria developed through a public stakeholder process. The process shall include feedback and participation from Illinois Solar for All Program stakeholders, including participants and organizations in environmental justice and historically underserved communities. The report shall include a summary of the evaluation of the Illinois Solar for All Program based on the stakeholder developed objective criteria. The report shall include the number of projects installed; the total installed capacity in kilowatts; the average cost per kilowatt of installed capacity to the extent reasonably obtainable by the Agency; the number of jobs or job opportunities created; economic, social, and environmental benefits created; and the total administrative costs expended by the Agency and program administrator to implement and evaluate the program.*

The Agency has previously conducted two solicitations to select an Evaluator. The first solicitation (19-RFQ-02/19-RFP-02) selected an independent evaluator who reported on the first three program years (through May 2021); the second solicitation (23-RFQ-02/23-RFP-02) selected a new independent evaluator who has completed an annual report for the fourth program year (June 2021 through May 2022), two topical mid-year evaluation reports, and will complete evaluations of two additional program years (through May 2024) during their term. **Each of the evaluation reports produced by the selected Evaluators can be found at: <https://www.illinoissfa.com/evaluation/>.**

This Solicitation represents the first step in the Agency’s process of selecting the next independent evaluator.<sup>6</sup> Qualified Offerors, based on the responses to this RFQ, will be invited to submit proposals in response to a more detailed RFP.

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<sup>4</sup> The term of the current Program Administrator ends June 30, 2025 and can be extended up to three additional years.

<sup>5</sup> See [www.illinoisshines.com](http://www.illinoisshines.com).

<sup>6</sup> Prior to the issuing of this Solicitation, the Agency and Program Administrator held a stakeholder feedback session and solicited written comments on the evaluation process. See <https://ipa.illinois.gov/renewable->

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This Solicitation is exempt from the procedures in the Illinois Procurement Code (30 ILCS 500) pursuant to Sections 1-25(2) and 1-56(f) of the Illinois Power Agency Act (20 ILCS 3855) and contains alternative bidding procedures pursuant to Section 20-10(i) of the Procurement Code (30 ILCS 500/20-10).

**BRIEF DESCRIPTION:** The evaluation of the Illinois Solar for All Program sought by the Agency consists of two comprehensive annual reports, each covering a program year. The annual reports will include metrics, analysis, qualitative feedback, and program improvement recommendations, along with an accompanying summary report that condenses key metrics and recommendations, and culminating in presentations of each annual evaluation report's findings and recommendations to be provided to program stakeholders. Additionally, the Agency seeks brief, focused mid-year reports on specific program topics, to be released between the annual reports to provide targeted pertinent analysis to the agency, stakeholders, and the public. For example: a focused report may focus on energy sovereignty in ILSFA, describing the legislative mandate for dedicating a portion of ILSFA funding towards projects offering participant ownership, an analysis of how to balance the participant benefits of ownership with the responsibilities and risks, and recommendations how ILSFA might better incentivize energy sovereignty projects across all sub-programs. Additional information on the anticipated scope is included in Section 2 of this RFQ.

The purpose of this RFQ is to determine if Offerors meet the following qualifications:

- (A) Direct previous experience evaluating low-income energy programs
- (B) Experience in the evaluation of one or more of the following
  - i. Solar energy development programs
  - ii. Energy programs in Illinois
- (C) Experience working with stakeholders in public and community engagement processes
- (D) Experience with quantitative data collection strategies for targeted populations, and cultural sensitivity around interaction with local community-based organizations and low-income individuals
- (E) Experience modeling job impacts
- (F) Experience in the evaluation of economic and social benefits of energy programs
- (G) Previous experience evaluating Diversity, Equity, and Inclusion in energy program initiatives, including, but not limited to, grassroots education, environmental justice communities and trade industry outreach
- (H) Adequate resources to perform and fulfill the required functions and responsibilities; and
- (I) The absence of a conflict of interest and inappropriate bias for or against potential program participants, the State of Illinois, or the affected electric utilities.

For the purpose of the consideration of these qualifications, "energy programs" may include energy efficiency programs, renewable energy programs, or energy assistance programs.

Qualified Offerors will be invited to respond to a subsequent RFP that will provide an opportunity for the Offerors to describe in detail their proposed approaches to the services and deliverables listed in Sections 2.2 and 2.3, specific resources available to execute those services and deliverables, and proposed price. The Agency will score responses to the RFP to determine the Offeror best suited to

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[resources/stakeholder-engagement.html](#) (Illinois Solar for All Evaluation Request for Stakeholder Comments (December 2, 2024). This solicitation reflects the input received during that process.

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serve as the Agency's Illinois Solar for All Program Evaluator. That selection is subject to approval by the Illinois Commerce Commission.<sup>7</sup>

The resulting contract with the awarded Offeror shall have a term of approximately May 16, 2025 through June 30, 2027 and will include evaluation of Illinois Solar for All for the program years 2024-2025, 2025-2026, and 2026-2027.

**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, 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.

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<sup>7</sup> 20 ILCS 3855/1-75(a)(4), (6).

## 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 to disseminate information about this Solicitation. The State publishes procurement information, including updates, on the Illinois Procurement Bulletin ([www.bidbuy.illinois.gov](http://www.bidbuy.illinois.gov)), Illinois Public Higher Education Procurement Bulletin ([www.procure.stateuniv.state.il.us](http://www.procure.stateuniv.state.il.us)), Transportation Procurement Bulletin ([www.dot.il.gov/desenv/transprocbulletin.html](http://www.dot.il.gov/desenv/transprocbulletin.html)) or the Illinois Capital Development Board Bulletin ([www.cdb.state.il.us/procurement.shtml](http://www.cdb.state.il.us/procurement.shtml)) (collectively and individually referred to as “Bulletin”). The Agency will also post this Solicitation and related documents and announcements to its website (<https://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: James Rouland	Phone: 312-814-8611
Agency: Illinois Power Agency	Fax: 312-814-0926
Street Address: 180 N. Wabash Ave, Suite 500	TTY: 866-846-5276
City, State Zip: Chicago, IL 60601	
E-mail: James.Rouland@illinois.gov	

Questions or comments regarding this RFQ should be timely directed in writing to the Solicitation Contact identified above. Communications are preferred to be via email, at the email identified above, with the subject header as follows: **[Offeror Name] – IPA ILSFA Evaluator [Response/Question/Comment]**. 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, that pertain to this Solicitation must be submitted in written form and submitted to the Solicitation Contact no later than February 5, 2025, 5 PM Central Prevailing Time (“CPT”). Questions received and Agency responses may be posted as an Addendum to the

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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. Email submission is preferred at the email address listed below; however, hard-copy documents can also be provided to the address listed.

Submittal Due Date & Time:

February 14, 2025

5 PM CPT

Submit/Deliver Submittals To:

Agency: Illinois Power Agency
Attn: James Rouland
Address: 180 N. Wabash Ave., Suite 500
City, State Zip: Chicago, IL 60601
E-mail: James.Rouland@illinois.gov
Solicitation Title & Reference # Request for Qualifications – Program Evaluation, 25-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)** to the e-mail address listed in Section 1.3 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.

or

**(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) of the Submittal of Qualifications package must be provided. The package shall contain the

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following two sections: Section 1 – Submittal of Qualifications Check List and Section 2 – Technical Proposal.

- 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 designated with “ILCS” (Illinois Compiled Statutes). Vendor may view the full text at ([www.ilga.gov/legislation/ilcs/ilcs.asp](http://www.ilga.gov/legislation/ilcs/ilcs.asp)). Sections 1-56 and 1-75 of the Illinois Power Agency Act (20 ILCS 3855) are 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 of Qualifications 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 of Qualifications 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 Offers 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, the substance of the Offer, and the price 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, 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. The Agency’s 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) 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 20 ILCS 3855/1-56(b)(6). As a result of this Solicitation and any subsequent RFP, the Agency may select



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the winning Offeror to evaluate the Illinois Solar for All Program. The Agency's selection is subject to approval by the Illinois Commerce Commission. If the Agency issues an award, the award will be made to the Responsible Offeror whose offer best meets the specified requirements and evaluation criteria.

- I.11 INCORPORATION OF 25-RFQ-01 BY REFERENCE:** This Solicitation (25-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 to this Solicitation, only qualified Offerors will be invited to respond to any subsequent RFP.
- I.13 EVALUATION PROCESS:** The Agency determines how completely and 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.

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 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.

**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 elements of expertise, skills, experience and qualifications.

<b>Threshold Criteria to Evaluate Responsive and Responsible Offerors</b>
(A) Direct previous experience evaluating low-income energy programs
(B) Experience in the evaluation of one or more of the following <ol style="list-style-type: none"><li>i. Solar energy development programs</li><li>ii. Energy programs in Illinois</li></ol>
(C) Experience working with stakeholders in public and community engagement processes
(D) Experience with quantitative data collection strategies for targeted populations, and cultural sensitivity around interaction with local community-based organizations and low-income individuals
(E) Experience modeling job impacts
(F) Experience in the evaluation of economic and social benefits of energy programs
(G) Previous experience evaluating Diversity, Equity, and Inclusion in energy program initiatives, including, but not limited to, grassroots education, environmental justice communities, and trade industry outreach
(H) Adequate resources to perform and fulfill the required functions and responsibilities; and
(I) The absence of a conflict of interest and inappropriate bias for or against potential program participants, the State of Illinois, 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 all threshold criteria will be placed on a short list of pre-qualified Offerors. Offerors on the short list will be invited to submit a response to the subsequent RFP. Only RFP responses from invited Offerors will be accepted by the Agency.

**I.15 MINORITY, FEMALE, AND PERSONS WITH DISABILITY PARTICIPATION AND UTILIZATION PLAN:** Any subsequent RFP solicitation will contain a minimum 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 Plan 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 Commission on Equity and Inclusion](#) 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:

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The BEP program offers a [primer video](#) on completing Utilization Plans, and guidance on [good faith efforts](#).

The Utilization Plan is not required as part of the response to this RFQ. It will be a required component of any subsequent RFP. **The Agency strongly encourages Offerors to carefully review the Utilization Plan template and familiarize themselves with the requirements for developing an acceptable Utilization Plan.**

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:** The Agency plans to follow the timeline below to contract for the professional services of an Illinois Solar for All Program Evaluator:

- RFQ Issued: January 24, 2025
- RFQ Offerors Workshop: January 31, 2025, 2:00 PM CPT<sup>8</sup>
- Deadline to submit written questions: February 5, 2025, 5 PM CPT
- RFQ Responses due: February 14, 2025, 5 PM CPT
- RFP Issued: March 5, 2025 (*tentative*)
- RFP Responses Due: April 4, 2025 (*tentative*)
- Award made: April 25, 2025 (*tentative, subject to ICC approval*)

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<sup>8</sup> Please send an e-mail to the Solicitation Contact listed above to request the call-in number for this call.

## SECTION 1 – CHECK LIST

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### 1. 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 25-RFQ-01 BY REFERENCE:** Offeror acknowledges that this Solicitation (25-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  N/A

**1.4. SUBMISSION OF TECHNICAL PROPOSAL – Section 2:** Offeror is submitting a complete and responsive Technical Proposal, Section 2, in a properly labeled e-mail or container, to the correct e-mail address or location, and by the due date and time.

Yes  No

**1.5. MILESTONES AND DELIVERABLES:** Offeror has the capability to meet the agency's milestones and deliverables requirements in Sections 2.3.

Yes  No

**1.6. OFFEROR QUALIFICATIONS:** Offeror has responded affirmatively to all qualifications questions contained in Section 2.4.

Yes  No

**1.7. OFFEROR STATEMENT OF QUALIFICATIONS:** Offeror has provided an accurate and complete statement of qualifications in Section 2.5.

Yes  No

**1.8. OFFEROR SIGNATURE:** An authorized representative of the identified Offeror has signed this Submittal of Qualifications, bottom of Section 2.

Yes  No

**2. SPECIFICATIONS, QUALIFICATIONS, AND STATEMENT OF OFFEROR QUALIFICATIONS**

**2.1. GOAL:** The Agency seeks a qualified and responsible Evaluator to conduct evaluations that review and report on the Illinois Solar for All Program and the performance of the third-party program administrator.

**2.2. EXPERTISE, EXPERIENCE, AND SERVICES REQUIRED:** The Agency seeks expert evaluation services from qualified Offerors that, at minimum, have the following experience and qualifications:

- A. Direct previous experience evaluating low-income energy programs
- B. Experience in the evaluation of one or more of the following
  - i. Solar energy development programs
  - ii. Energy programs in Illinois
- C. Experience working with stakeholders in public and community engagement processes
- D. Experience with quantitative data collection strategies for targeted populations, and cultural sensitivity around interaction with local community-based organizations and low-income individuals
- E. Experience modeling job impacts
- F. Experience in the evaluation of economic and social benefits of energy programs
- G. Previous experience evaluating Diversity, Equity, and Inclusion in energy program initiatives, including, but not limited to, grassroots education, environmental justice communities and trade industry outreach.
- H. Adequate resources to perform and fulfill the required functions and responsibilities
- I. The absence of a conflict of interest and inappropriate bias for or against potential program participants, the State of Illinois, or the affected electric utilities.

For the purpose of the consideration of these qualifications, “energy programs” may include energy efficiency programs, renewable energy programs, or energy assistance programs.

**Scope of Evaluation**

The Agency proposes inclusion of the following elements in the comprehensive annual reports. These include both quantitative and qualitative evaluations.

Per Section 1-56(b)(6) of the IPA Act, the evaluation must evaluate the following:

- Number of projects installed
- Total installed capacity in kilowatts
- Average cost per kilowatt of installed capacity
- Number of jobs or job opportunities created
- Economic, social, and environmental benefits created
- Total administrative costs

In addition, the IPA proposes that the evaluation further analyze the metrics above by the following factors:

- By sub-program (residential distributed generation, Non-profit/Public Facilities, Community Solar)
- For DG and Community Solar, by owners and renters

## Section 2 – Technical Proposal and Signature Page

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- By business model (e.g., purchase, lease, power purchase agreement)
- By geographic regions including, but not limited to Environmental Justice communities, Low-income communities, rural, suburban, and urban areas
- Other socioeconomic or demographic characteristics proposed by the Evaluator and/or stakeholders

Economic, social, and environmental benefits should be considered by evaluating:

- Impact of the solar installation or community solar subscription on the energy costs of participants
- Impact of factors outside of Illinois on the program (e.g., supply chain disruptions, tariffs, reduction of federal tax credits)
- Correlation between locations of installations and where job trainees live
- Percent of domestically produced panels
- Non-energy benefits including impact on community awareness or other measures for well-being
- Impact on reliability of the electric distribution system
- CO2 reductions
- Energy and emissions equivalencies (e.g., homes powered, fossil fuel displacement equivalencies)
- Other environmental benefits proposed by the evaluator and/or stakeholders

Job and job opportunities created should be further evaluated by:

- Construction/installation jobs created
- Jobs created in other parts of the solar workforce (e.g., sales, system design, general construction/trades)
- Permanent versus temporary jobs created
- Percent of installation hours by qualified job trainees
- Supply chain jobs created
- Induced jobs created
- Average wages/salaries
- Effectiveness of coordination of job training providers and Approved Vendors/installers
- Metrics of employment of diverse workers

In addition to the statutorily required metrics, the evaluation should also consider the following:

- Performance Metrics<sup>9</sup>
  - Incentive dollars awarded
  - All-in average cost per kilowatt-hour of expected production

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<sup>9</sup> Metrics used by evaluations of other state income-eligible solar incentive programs should be considered, to establish common evaluation practices of similar programs on a national level.

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- Housing stock issues that prevented participation in the Distributed Generation Program
- Rate of projects that are not completed (and contributing factors)
- Complaints/participant satisfaction with Approved Vendors
- Average savings by business model types
- Evaluation of Program Administrator’s performance
  - Overall assessment of how the Program Administrator is managing of day-to-day program processes
  - The success of outreach undertaken by the Program Administrator, including engagement with community groups and stakeholders through both stakeholder sessions and comments received
  - Program Administrator’s work with Approved Vendors to educate them on criteria and measurements of success as well as how the Program Administrator worked with struggling or non-compliant Approve Vendors to inform and support their path back to compliance
  - Surveys of Approved Vendors regarding their experience with the Program Administrator
  - Effectiveness of grassroots education campaigns and impact on increased uptake of solar projects
  - Coordination efforts undertaken by the Program Administrator to connect people with both job training and solar opportunities

The Agency also desires that the evaluator analyze the Program in comparison to other state low- and moderate-income solar programs nationwide.

Other topics the Agency would like to see included in the evaluation plan are:

- 1-4 unit distributed generation participation (including barriers for Approved Vendors and participants, and comparison to participation in the Adjustable Block Program)
- Analysis of program incorporation of diversity, equity, and inclusion
- Income distribution of ILSFA participations within the 80% AMI standard.
- Customer savings analysis
  - Actual savings achieved compared to expected savings
  - Determining if there is a difference in savings between customer homes solely with solar through ILSFA versus those that electrified their home, utilized available weatherization and energy efficiency incentives, and include solar
- Income verification method use and impacts on customer participation
- Impact of ILSFA job training requirements
- Grassroots education outcomes
- Analysis of new energy sovereignty incentive implementation
- Analysis of ILSFA in the context of other state income-eligible solar programs for best practices and program improvements
- Analysis of subscribers to ISLFA community solar and recipients of ILSFA residential distributed generation to identify success criteria, decision-making processes leading to

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participation, end-to-end experience of the process, and feedback on opportunities to improve the overall experience.

- Energy Sovereignty<sup>10</sup>
  - Importance of energy sovereignty projects to consumers and AVs
  - Energy sovereignty customer savings versus non-ES customers
  - Analysis of energy sovereignty project metrics, such as number of energy sovereignty projects completed and years to transfer ownership
- Program Administration review
  - AV portal and application processing
  - Effectiveness of Program Administrator customer service & customer service tools
- AV performance and customer satisfaction
  - Analysis of “no cost” projects
  - Time duration through key project milestones; such as, Part I residential and NPPF application submission through to energization, or for community solar customer subscription sign-up to bill savings
  - Participation rates

The Agency is also interested in evaluation that incorporates Approved Vendor and Participant feedback including, but not limited to:

- Evaluation information gathering processes that include focus groups and listening sessions with potential and current ILSFA customers, solicited in partnership with the Grassroots Education organizations
- Standardized surveys for both Approved Vendors and participants to complete that would be standardized and used to track satisfaction and success through program updates
- Feedback opportunities for program stakeholders in selecting mid-year report topics

The Agency expects that the Evaluator will provide, at minimum, the following presentations and materials to the Agency and other pertinent stakeholders:

- Hosting two live and recorded sessions, one held outside regular business hours, to present results and findings of each Annual Report to program stakeholders.
- Annual Reports that should include a Summary document to provide condensed metrics and recommendations (not to exceed 10 pages), and a 1-2 page fact sheet or infographic highlighting key results and metrics, which shall also be available publicly on the Illinois Solar for All website.
- Presentation of results of Annual Report and focused Mid-Year Reports to ILSFA Advisory Group, with opportunity for questions and feedback from stakeholders.

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<sup>10</sup> Section 1-56(b)(2)(A)(i) of the IPA Act requires the Agency to reserve “a portion” of Illinois Solar for All funding “for projects that promote energy sovereignty through ownership of projects by low-income households, not-for-profit organizations providing services to low-income households, affordable housing owners, community cooperatives, or community-based limited liability companies providing services to low-income households.” Further information can be found in Section 8.2.4 of the 2024 Long-Term Plan.



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Additional information on the anticipated scope of the evaluation will be provided in the subsequent Request for Proposals. In addition, it is expected that the Evaluator will seek additional stakeholder feedback on the scope of the evaluation and incorporate those recommendations to the extent practicable.

**2.3. MILESTONES AND DELIVERABLES:** The successful Offeror will be able to assist the Agency to meet several expected milestones and deliverables as indicated below:

- 2.3.1. Program Year 2024-2025 evaluation. By January 2026, provide a draft high-level evaluation report on the 2024-2025 Program Year (Program Year 7) of Illinois Solar for All based on the scope described in Section 2.2, and subsequently provide a final evaluation report for the program year with accompanying summary report, and presentation of program findings, metrics, and recommendations to program stakeholders.
- 2.3.2. Program Year 2025-2026 evaluation. By January 2027, provide a draft high-level evaluation report on the 2025-2026 Program Year (Program Year 8) of Illinois Solar for All based on the scope described in Section 2.2 and subsequently provide a final report for the program year with accompanying summary report, and presentation of findings, metrics, and recommendations to program stakeholders.
- 2.3.3. Mid-year reports. Shorter, focused reports shall be provided periodically between the Program Year evaluation reports. The initial drafts for these reports are tentatively expected in November 2025, May 2026, November 2026, and May 2027.
- 2.3.4. Providing 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 required by Illinois Commerce Commission Orders.

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

Minimum Requirement	Offeror must state below whether its staff meet each Minimum Requirement by entering Yes or No
(A) Direct previous experience evaluating low-income energy programs	<a href="#">Click here to enter text.</a>
(B) Experience in the evaluation of one or more of the following i. Solar energy development programs ii. Energy programs in Illinois	<a href="#">Click here to enter text.</a>
(C) Experience working with stakeholders in public and community engagement processes	<a href="#">Click here to enter text.</a>
(D) Experience with quantitative data collection strategies for targeted populations, and cultural sensitivity around interaction with local community-based organizations and low-income individuals	<a href="#">Click here to enter text.</a>
(E) Experience modeling job impacts	<a href="#">Click here to enter text.</a>
(F) Experience in the evaluation of economic and social benefits of energy programs	<a href="#">Click here to enter text.</a>
(G) Previous experience evaluating Diversity, Equity, and Inclusion in energy program initiatives, including, but not limited to, grassroots education, environmental justice communities, and trade industry outreach	
(H) Adequate resources to perform and fulfill the required functions and responsibilities; and	<a href="#">Click here to enter text.</a>
(I) The absence of a conflict of interest and inappropriate bias for or against potential program participants, the State of Illinois, or the affected electric utilities.	<a href="#">Click here to enter text.</a>

- 2.5. OFFEROR STATEMENT OF QUALIFICATIONS:** Please describe Offeror’s background, experience and qualifications relevant to the role of the Agency’s Illinois Solar for All Program Evaluator. Be sure to specifically address **each** of the nine criteria (A-I) listed in

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Section 2.4. 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.](#)

**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 date.](#)