



# **Illinois Shines and Illinois Solar For All Joint Program Administrator RFP**

Questions and Answers  
January 27, 2026

# Agenda

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- 1. Workshop Logistics**
- 2. RFP Timeline**
- 3. RFP Questions**
- 4. Business Enterprise Program**
- 5. Transition Plan**
- 6. Pricing Section**
- 7. Offeror Q&A Session**
- 8. Next Steps**

# Workshop Logistics



- The workshop is framed to:
  - Summarize the timeline for the remainder of the process.
  - Provide Offerors with summary information on the recently issued RFP and accompanying materials (Appendices and Attachments).
  - Provide Offerors with a live Q&A Session to support proposal development.
- We request you stay on mute throughout the workshop unless asking a question – either during the IPA presentation or during the Q&A Session at the end.
  - This will limit the risk of audio issues and ensure everyone can be heard (i.e., no accidental speaking over each other).
  - An IPA moderator will be actively reviewing the queue and communicating with presenters on Offerors seeking to ask a question.

# Workshop Logistics



- If you have a question, please use the “raise hand” feature on your screen.
  - The IPA’s moderator will track raised hands and notify speakers of your request to ask a question.
  - Please do not come off mute until called upon by the moderator or presenter. During that time, the moderator will specifically call upon you, request you come off mute and ask your question – where the floor will be yours.
- Offerors are also permitted to ask questions in the chat (written).
  - Written questions will be provided the same attention as a verbal question.
  - Written questions likely require a moment for the moderator to review, then for the IPA team to also review. This may lead to the question queued until the end of the presentation (i.e., during the Q&A Session). Be rest assured, your question will be discussed on the call.

# Workshop Logistics (cont.)



- This workshop is not being recorded.
- The presentation will be posted on the IPA website after the call (*reference the “Joint ILSFA & Illinois Shines Program Administrator” section under the Stakeholder Engagement page*).

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- Following today's workshop, Stakeholders have an additional period to submit written questions about the RFP.
  - The deadline to submit questions is January 30<sup>th</sup>.
  - Agency is targeted a release of responses in a single-batch on February 6, 2026 (*subject to the number of questions asked*).
- The Agency will attempt to document Offeror questions during the Workshop; however, Offerors should not rely on this.

# Presenters

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**Jim Rouland**

Planning and Procurement Bureau Chief

**Jen Schmidt**

Senior Program Manager, Illinois Solar For All

**Andrea O'Shea**

Program Manager, Illinois Shines

**Anthony Star**

Senior Advisor

**Kate Clifford**

Senior DEI Manager, IPA BEP Liaison

- **RFP Issued**: January 16, 2026
- **RFP Offerors Virtual Workshop**: January 27, 2026, 11 AM CPT
- **Deadline to submit written questions**: January 30, 2026, 5 PM CPT
- **NIGP Code Revision Requests Due for BEP**: March 5, 2026, 5 PM CPT
- **RFP Responses Due**: March 13, 2026, 5 PM CPT
- **Finalist Interviews**: Early April (*to be scheduled by IPA following receipt of proposals*)
- **Award made**: May 15, 2026 (*Tentative*)
- **Contract start date**: June 1, 2026 (*Tentative*)

## Offeror Experience

- **Intent:** Agency seeking a Program Administrator who can manage the current size and rigor of the programs and build on the programs' successes to support their expansion.
- **Primary Question Elements:** Focus on what makes the Offeror excel as the Program Administrator; how they stand out; right fit; and, how the Offeror would strengthen the Agency's programs.

## Program Administration & Management

- **Intent:** The Agency is seeking to understand Offeror-specific capability in running the programs with an eye toward communications with the Agency, issue management, providing recommendations and solutions to resolve issues, and performance improvement.
- **Primary Question Elements:** Focus on project management approach such as reporting, issue identification and resolution, process management/controls and KPIs, participant communication, and data management.

## Information Technology Solutions

- **Intent:** Agency seeking an integration of systems, with portals and all underlying systems, databases, and tools stood up and fully functional by March 1, 2027, with the Illinois Shines components of the portal stood up by January 1, 2027.
- **Primary Question Elements:** Focus on program portal, data management, customer relationship management, and grassroots education data tracking, generative artificial intelligence, technology development approach, cybersecurity, threat management, service levels, post-contract portal access.

## Application Processing & Project Management

- **Intent:** Agency seeks Program Administrator with experience and capability to manage project applications throughout their lifecycle.
- **Primary Question Elements:** Focus on staffing, ramping up and down, portal maintenance, collecting and tracking fees, maintaining a participant database, relationship management with approved vendors, managing REC Contracts, performing qualitative and quantitative review of project applications.

## Participant & Customer Support

- **Intent:** Agency seeks a Program Administrator that supports both participating companies – Approved Vendors, Designees, Equity Eligible Contractors, Subcontractors, Small and Emerging Businesses – and the customers that those participating entities serve.
- **Primary Question Elements:** Focus on overall approach to identifying and resolving issues with participants, keeping businesses engaged, addressing customer problems and complaints.

## Implementing Consumer Protections

- **Intent:** Agency seeks Program Administrator that recognizes safeguards for consumers participating in the programs are vitally important.
- **Primary Question Elements:** Focus on intaking and investigating consumer complaints, making disciplinary determinations, various forms of written communication, ensuring correct and pertinent information is available for consumers, supporting “stranded customers,” leading a Consumer Protection Working Group.

## Implementing Labor & Equity Provisions

- **Intent:** Agency seeks Program Administrator that can implement all labor and equity provisions applicable to both IPA solar incentive programs.
- **Primary Question Elements:** Focus on the Equity Accountability System, including Equity Eligible Persons and Contractors, Minimum Equity Standard compliance, reviewing project labor agreements, ensuring compliance with prevailing wage requirements, process requests for advance of capital.

## Marketing, Communications, & Outreach

- **Intent:** Agency seeks Program Administrator that creates content for and connects with program participants, customers, and broader stakeholder communities and organizations.
- **Primary Question Elements:** Marketing focus on program announcements to stakeholders and other public-facing materials, digital campaigns and websites; with outreach focus on building trusted relationships and providing virtual and in-person feedback opportunities.

## Transition Planning & Program Efficiencies

- **Intent:** Agency seeks a smooth, phased-in approach over program year 2026-2027, as continuity of the operations of Illinois Shines and Illinois Solar for All is critical for the market.
- **Primary Question Elements:** Focus on experience transitioning programs from one team to another, key lessons learned, risk assessment of IPA transition, suggested adjustments to timeline.

# Notes Throughout the RFP

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- Please do not repeat content from the RFQ or marketing materials.
- Page limit for responses to questions is **200 pages** (*does not include resumes*).
- Responses to each question should stand on its own (i.e., not be dependent upon a link to another question's response for context or understanding).

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- Offerors are instructed to follow the organization defined by the Agency's RFP. This ensures the Agency team can link Offeror proposal responses to each component of the RFP as it is laid out.
- Prior to submitting proposals, please confirm all required parts have been included as instructed. This includes checklists, signing the forms, and ensuring all forms are fully completed.

# Scoring Table

Question	Elements of Responsibility for Evaluation	Maximum Points Awarded	Minimum Points Needed
1	Offeror Experience	150	31
2	Program Administration & Management	150	31
3	Information Technology Solutions	150	31
4	Application Processing & Ongoing Project Management	150	31
5	Participant & Customer Support	100	21
6	Implementing Consumer Protections	100	21
7	Implementing Labor and Equity Provisions	50	11
8	Marketing and Communications	50	11
9	Transition Planning	50	11
Section 3	Reasonableness of Pricing Components	50	11
Section 2.7	Absence of conflict of interest and acceptable conflict of interest management plan	Pass/Fail	
I.17/ Attachment MM	Acceptable BEP Utilization Plan	Pass/Fail	
<b>Totals</b>		<b>1,000</b>	<b>210</b>

- Each question (1-9) and Section 3 has:
  - A maximum score available (150, 100, or 50 points)
  - A minimum score that must be met to “pass”
- The Conflict of Interest (COI) requirements (Section 2.7) and BEP Utilization Plan (see I.17 and Attachment MM) are pass/fail.
  - A failure to disclose COIs or if identified conflicts are not resolved it will result in a “Fail.”
  - If a Utilization Plan is not submitted or if the submitted plan does not meet the defined 10% goal it will result in a “Fail.”

To support Offeror proposal development, the Agency included Attachment 9 ("Transition Matrix") to the RFP.

- This matrix is not a mandated orientation, but a guide.
- The intent is to group key activities, roles and responsibilities together by major groups over a relative time period (e.g., Fiscal Year 2026 vs. Fiscal Year 2027...) to help orient prospective Offerors on the types of tasks and the potential time needed to framework, develop/construct the solution(s), and assume full responsibility.
- Offerors should infuse their best management practices and recommendations to maximize efficiency of transition and program stand-up.

# Business Enterprise Program (BEP)



- **Reference RFP Section 1.17 and Appendix MM**
  - The Agency prioritizes the goal to intentionally create opportunities for businesses owned and controlled by minorities, females, and persons with disabilities in the procurement and contracting processes.
  - **BEP Utilization Goal:** 10% of the contract amount.

- Please consult Section I.17 of the RFP for more information on the requirements that must be met through the submittal of the Minorities, Women, and Persons with Disabilities Participation and Utilization Plan.
- The Business Enterprise Program, Minorities, Woman, and Persons with Disability Utilization Plan Template is linked in Attachment MM:
  - <https://cei.illinois.gov/content/dam/soi/en/web/cei/documents/U-Plan%20V.25.1.pdf>
  - Offerors must submit a complete Utilization Plan as Attachment MM to their RFP response.

# BEP Key Considerations



- **NGIP Code: 918-97**
  - All BEP-certified subcontractors must be certified in this code.
  - The process for NGIP Code expansion rests with the Agency in which a sub became certified and is at the mercy of the timelines of their internal processing and the processing of CEI. IPA does not manage BEP certification processes.
  - Expedited processing may be requested of CEI's Certification Manager, Carlos Gutierrez. Please cc Kate Clifford if requesting expedited processing.
  - If an offeror wishes to request a NGIP Code Revision to this solicitation, bidders must formally request NGIP code revision at least seven days before the due date for this RFP (March 5, 2026).
  - Please send NGIP Code Revision Request Forms directly to the Agency's BEP Liaison, Kate Clifford at [kate.clifford@illinois.gov](mailto:kate.clifford@illinois.gov).
- **Cures are allowed**
  - Scrivener's errors; information submitted in an incorrect form or format; mistakes resulting from failure to follow instructions or to identify and adequately document good faith efforts taken to comply with the utilization plan; or a proposal to use a firm whose Business Enterprise Program certification has lapsed or is not yet recognized.
  - Cure is not authorized if the bidder or offeror submits a blank utilization plan, a utilization plan that shows lack of reasonable effort to complete the form on time, or a utilization plan that states the contract will be self-performed, by a non-certified vendor, without showing good faith efforts or a request for a waiver.
- **Please contact Kate at [kate.clifford@illinois.gov](mailto:kate.clifford@illinois.gov) for questions you may have**

# Pricing Section



- Scoring of RFP responses will focus on: “Reasonableness of Pricing Components.”
- Total Price Quote is indicative of the scale of the bid.
  - Agency recognizes that final contract award will require negotiations with selected Offeror.
- Agency seeks to understand:
  - Phase One: What it will take the Offeror to assume administration of the programs.
  - Phase Two: What the Offeror believes it will cost to administer the programs.
- Pricing Components table in Section 3.3 should be filled out completely to demonstrate the scale of each activity component.
- Budget template spreadsheet in Appendix NN can be modified to provide transparency into the Pricing Components table. It should be accompanied by a thorough narrative explanation to ensure transparency and understanding of the proposed pricing components and resulting costs is conveyed to the Agency.

# Offeror Questions & Answers

- If you have a question, please use the **“Raise Hand”** feature to indicate you interest in joining the queue.
- Please remain on mute until we call on you to avoid audio feedback or risk of accidentally talking over each other.
- Remember, you can also ask a question by typing it in the chat as well.

# Next Steps

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- Written Questions due by January 30, 2020, 5:00PM Central.
  - Responses posted as soon as possible – targeting Friday, February 6<sup>th</sup>; however, this is subject to the number of questions asked.
  - Please refer to **RFP Section I.3 and I.4** for solicitation contact information and details on submitting questions.
- Offeror Proposals due by March 13, 2026, 5:00PM Central.
  - Refer to Section I.5 of the RFP for contact details to submit proposals.

**Thank you for participating in today's  
workshop.**