

ILLINOIS POWER AGENCY

Request for Proposals 26-RFP-01

PROFESSIONAL SERVICES - ILLINOIS SHINES AND ILLINOIS SOLAR FOR ALL PROGRAM
ADMINISTRATION

Responses to Offeror Questions

Batch 2

February 20, 2026

Note: RFP Responses to Offeror Questions Batch 1 released February 10, 2026

Data

	Question	Answer
39	For income verification, what is the data retention policy for participant data used to confirm eligibility? Do we need to audit income eligibility determinations in the future and if so, how long after the determination will we be expected to conduct an audit?	<p>Agency interprets this question to be about long-term record retention expectations for participant data which is inclusive of participant eligibility data. Income verification documentation can originate from either Approved Vendors or directly from potential customers requesting eligibility verification. Whether from the Approved Vendor or customer directly, income verification information is currently sent to the Program Administrator electronically. Concerning record retention policies all records must be retained indefinitely. The Agency plans to develop a more expansive and comprehensive record retention policy in the future. When the record retention policy is developed, the Agency will communicate with the Program Administrator to both obtain feedback on the policy before implementation and to develop an implementation schedule. Until such time that a record retention policy is developed, again, the Agency expects all records to be retained indefinitely.</p> <p>There is currently no audit process in place for income eligibility. Broadly, the audit process proposed in the 2026 Long-Term Plan for income verification will be informed by stakeholder feedback prior to finalization and implementation. The Agency currently envisions customers self-attesting their income levels through means already in effect, with the audit consisting of the Program Administrator requesting income documentation for applications selected for audit during the income verification process and before determining project eligibility and Part I Approval. The Agency has not yet defined how customer sampling will be determined. This will be informed by the stakeholder process and by recommendations from the joint Program Administrator; however, the Agency is currently envisioning random sampling of a yet to be determined percentage of customers from an Approved Vendor.</p>

Program Management

	Question	Answer
40	Are there defined expectations for the scope and scale of stakeholder engagement activities (ex. roundtables, advisory committees, outreach events)?	<p>Illinois Solar for All and Illinois Shines seek engagement from a wide range of stakeholders to inform the direction of the programs. Most substantive program materials, including the Approved Vendor Manual, Program Guidebook, and Consumer Protections Handbook have a feedback opportunity in the annual update process. These feedback opportunities typically involve soliciting written feedback and occasionally involve holding webinars to explain complex concepts and hear verbal feedback. Below is a summary of current outreach and engagement efforts; however, it is the Agency's expectation that the Program Administrator will evaluate such engagements to determine if adjustments or enhancements are necessary, and/or if new or additional engagements are necessary to properly support stakeholder engagement.</p> <p>The Consumer Protection Working Group meets monthly and discusses market trends, best practices, consumer education, updates to Program requirements and documents, and other consumer protection issues for both Illinois Shines and Illinois Solar for All. This is an opportunity for consumers, solar companies, community and nonprofit organizations, and other members of the</p>

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		<p>public to directly provide their insight and perspectives to the Program Administrator for both programs and to the IPA.</p> <p>The ILSFA Advisory Committee is led by the Program Administrator and currently meets on a quarterly basis. The Joint Program Administrator will be expected to do robust outreach to maintain a diverse balance of stakeholders on the Advisory Committee and provide educational support to Committee members to promote well-informed feedback. ILSFA also provides support to Small and Emerging Businesses through in-person and virtual workshops, and one-on-one support with the goal of expanding participation in ILSFA and Illinois Shines. The Joint Program Administrator will also support Grassroots Educators in achieving their own outreach goals through weekly office hours and regular one-on-one and pod check-ins. Office hours for Approved Vendors are held monthly and ILSFA Approved Vendor Managers work closely with Approved Vendors as a regular practice to address individual challenges.</p> <p>Key stakeholder forums for Illinois Shines include annual Approved Vendor Roundtables, both Approved Vendor and Designee and Customer Satisfaction surveys, ad hoc stakeholder working groups, weekly office hours, 1:1 vendor appointments and stakeholder feedback processes.</p> <p>The Illinois Shines Program Administrator hosts annual Approved Vendor Roundtable meetings for each of the Illinois Shines project categories. The Approve Vendor Roundtables provide an opportunity for participants to share Program feedback and offer insights on market challenges and conditions.</p> <p>The Illinois Shines program’s outreach efforts include identifying barriers and challenges that Approved Vendors face through market feedback collected in 1:1 meetings and stakeholder events, conduct market outreach with existing AVs to understand project pipelines for each category, and specifically for the Public Schools category, performing outreach efforts to increase awareness and participation among K-12 schools and districts and community colleges. Additionally, the Program focuses on community outreach centered on increasing Program participation by Equity Eligible Persons, Equity Eligible Contractors, and increasing Program participation in Equity Investment Eligible Communities, that includes attending at least 20 relevant events and/or meetings a year with local governments, community-based organizations, workforce development organizations and chambers of commerce that are focused on renewable energy and solar to educate them about the Program.</p> <p>Finally, the Illinois Shines program developed a Mentorship Program for Approved Vendors and Designees that are certified as Equity Eligible Contractors and/or minority-owned, women-owned, veteran-owned, disability-owned, or are considered small businesses. This Mentorship Program provides participants, or mentees, with training and presentations covering Program processes and requirements, and facilitates opportunities to network with other market stakeholders. The mentorship Program is offered twice a Program Year with cohorts of up to 20 mentees.</p> <p>As in other program areas, the Agency is open to identifying best practices and establishing consistent practices across the programs.</p>
41	<p>How many people currently work on Illinois Solar for All (from the incumbent and any subcontractors) and on Illinois Shines (from the incumbent and any subcontractors)?</p>	<p>Statistics of employees utilized by the current Program Administrators do not reflect either the optimal employee count or what the end-state should be upon the implementation of a joint Program Administrator may be or should be. Offerors should review requirements and materials provided through the RFP and develop an ideal personnel count to match the work required to administer the programs.</p> <p>Subject to the caveat above, the Agency is providing the following information as an example. The current Illinois Shines Program Administrator reported 60 full-time employees dedicated to the Program in Q4 2025. This is not inclusive of some part-time staff, nor of 12 subcontractors supporting the administration of Illinois Shines.</p>
42	<p>How much technical and engineering review is required for Illinois Solar for All versus Illinois Shines by the Program Administrator?</p>	<p>Additional project submission elements in ILSFA requiring or potentially requiring technical or engineering review include, but are not limited to, site suitability assessments, Home Repair Pilot Initiative repair funding requests, meeting of savings requirements, participant contract review, and verifying project specs compliance. Offerors are encouraged to review Sections 8.5 and 8.6 of the ILSFA Approved Vendor Manual and Sections 4 and 5 of the Illinois Shines Program Guidebook for detailed lists of Part I and Part II submission requirements for both programs. A comparison of these Sections will provide a solid foundation for similarities and differences between the programs related to technical review demands. More broadly, projects in both programs will occasionally require additional attention or engineering review if it is unclear if the project complies with program requirements. Such instances are ad hoc and situationally dependent.</p>

<p>43</p>	<p>The Approved Vendor guidance indicates that review of a complete Approved Vendor or Designee application typically occurs within an established timeframe (e.g., approximately 4–6 weeks). Please describe the end-to-end review and approval process, including the specific steps involved, the entity responsible for each step, and any dependencies that may affect timing. In addition, please identify which aspects of the process are fixed by statute or policy versus those that may be adjusted through process, tooling, or communications improvements.</p>	<p>The Approved Vendor and Designee applications have distinct requirements established in the Illinois Shines Section of the Long-Term Plan – specifically Sections 7.7 and 7.8 – along with Section 2 of the Illinois Shines Program Guidebook and Section 3.3 of the ILSFA Approved Vendor Manual.</p> <p>The IPA Act codifies the concept of Approved Vendors as the Program’s participants. The application requirements and process for both Approved Vendors and Designees have been defined through the Long-Term Plan and within the Program Guidebook; informed by a stakeholder feedback process. Approved Vendor and Designee requirements may be revised as necessary over time to better accommodate the needs of the programs.</p> <p>Currently, Approved Vendor applications for both programs are submitted via a Microsoft Form and supplemental documents are sent via email to the Program Administrator. For each Approved Vendor application, the current Program Administrator completes the following:</p> <ol style="list-style-type: none"> 1. Reviews the information provided by the applicant in the Company Ownership questions on the application 2. Checks the Illinois Department of Labor list of debarred contractors and ensures applicant is not listed 3. Looks up the applicant’s profile in the Better Business Bureau for consumer complaints 4. Reviews supplemental information that includes: <ol style="list-style-type: none"> a. Documentation of either PJM-GATS aggregator account or CleanCounts (formerly M-RETS) account ownership confirmation b. Illinois Secretary of State Statement of Good Standing dated within the past 12 months c. Distributed Generation Installer Certification from the Illinois Commerce Commission (required for AVs who apply as distributed generation installer) d. Samples of marketing materials e. MES Compliance Plan submission 5. Conducts a legal review searching for any legal cases involving the entity, its shareholders and any affiliates listed in the application 6. Conducts an audit of the applicant’s website and social media to review all marketing statements related to solar and or Illinois Shines references. <p>For Illinois Shines, the Designee registration requests are sent to the Program Administrator via email by an Approved Vendor or parent Designee, requesting to register a (Nested) Designee under their account. Upon registration, Designees are required to provide company ownership and affiliate information through a form. For each Designee registration request, the current Program Administrator completes the following:</p> <ol style="list-style-type: none"> 1. Reviews the information provided in the Designee Registration Form 2. Reviews the information provided in the Designee Company information Form 3. Reviews supplemental information that includes: <ol style="list-style-type: none"> a. Illinois Secretary of State Statement of Good Standing dated within the past 12 months b. Distributed Generation Installer Certification from the Illinois Commerce Commission (required for AVs who apply as distributed generation installer) c. Samples of marketing materials d. MES Compliance Plan submission <p>For ILSFA, the registration process is additive to the Illinois Shines registration. The substance of ILSFA registration is more focused on understanding the potential AV/Designee’s plans for participation and attesting understanding and compliance with the increased expectations of ILSFA participation. Designees are not required to register with Illinois Shines as ILSFA Approved Vendors are, but must register with ILSFA. Approved Vendors and Designees both register through the Approved Vendor Requirements and Registration page.</p> <p>The ILSFA Approved Vendor and Designee registration collects basic vendor information, point of contact information, intentions of participation by sub-program, geography, and business model, but the primary lift for Program Administrator review falls more in evaluating the potential Approved Vendor or Designee’s past experience and future plans for working in disadvantaged communities on ILSFA projects. Responses are mostly in short narratives and are scored against a published rubric. The registration questions and scoring rubrics for ILSFA registration can be found here:</p> <ul style="list-style-type: none"> • ILSFA Designee Registration: https://www.illinoisssa.com/wp-content/uploads/2024/11/Illinois-Solar-for-All-Approved-Vendor-Registration-and-Attestation-Designee.pdf
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		<ul style="list-style-type: none"> • ILSFA Approved Vendor Registration: https://www.illinoissfa.com/wp-content/uploads/2025/02/2025-2026-Approved-Vendor-Registration-and-Attestations-Approved-Vendor.pdf • Single Project Approved Vendor Registration: https://www.illinoissfa.com/wp-content/uploads/2024/04/Illinois-Solar-for-All-Single-Project-Approved-Vendor-Assignment-Registration-Form.pdf <p>ILSFA registration specifics are not directly tied to statute and most aspects of the application, process, and scoring could be revised through stakeholder-informed updates, but would likely require updates to be made in the Approved Vendor Manual, Program materials, website, and vendor portal, with timing considerations that ensures rollout of any changes are in place before the beginning of a program year.</p>
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Transition

	Question	Answer
44	<p>Given that some bidders may not be current program administrators, can the Agency clarify what additional program documentation, data, or process detail—if any—it intends to make available to all Offerors to ensure a level playing field for developing technically sound approaches and pricing?</p> <p>Can the IPA share standardized descriptions of current workflows, data structures, or system interfaces beyond what is included in the RFP appendices?</p>	<p>It is the Agency’s intent to emphasize that Offerors’ proposals will each be considered on their own merits, and proposals will be based on the strength of addressing the elements as outlined in 1.15 of the RFP. The Agency believes it has provided a sufficient level of documentation and detail through the materials provided in the RFP, the Appendices, and the responses to these questions (Batch 1 issued February 10, 2026, and this Batch 2 set) to provide Offerors with sufficient information and detail to develop a robust and complete Proposal, including guidance on pricing and price proposal evaluation.</p>
45	<p>To the extent the Agency is able to share, could you provide additional context on the current Salesforces and Mendix environments supporting the programs—for example, the major functional modules in use, key integrations, and how responsibilities are split between Salesforce/Mendix and other systems—so bidders can design realistic transition, integration, and risk-management approaches?</p>	<p>The information provided below is aggregated technical reference information, by program (Illinois Shines and ILSFA).</p> <p><u>Illinois Shines</u></p> <p>The Illinois Shines program utilizes Salesforce for the administration of the program’s email communications with participants, utilities, customers, and stakeholders in general and the registration of EECs. The following Salesforce modules are utilized:</p> <ul style="list-style-type: none"> Knowledge [base] Salesforce Archive (1GB) Salesforce Backup and Recover (1GB) <p>The Illinois Shines application portal developed in Mendix integrates several features including, but not limited to, the generation of Community Solar and Distributed Generation Disclosure Forms, project application submission and batching, Access to REC Contract details and documents, generation of removal notices, and data report generation.</p> <p>The following modules and integrations are utilized in the Illinois Shines portal:</p> <p><u>Mendix Marketplace</u></p> <ul style="list-style-type: none"> • Administration • AmazonS3Connector • AmazonSQSConnector • Atlas_Core • Atlas_Web_Content • AuditTrail • AWSAuthentication • AWSLambdaConnector • CommunityCommons • CSV • DataGrid2ResetFilters • DataWidgets • DeepLink

		<ul style="list-style-type: none"> • Email_Connector • Encryption • ExcellImporter • ForgotPassword • HelloSign • MXMemProfiler • MxModelReflection • NanoflowCommons • OQL • SAML20 • SignInMicroflow • StreamingExcel • TaskQueueHelpers • UserCommons • WebActions • ZipHandling <p>Illinois Shines Application Modules</p> <ul style="list-style-type: none"> • System • UserManagement • MyFirstModule • Home • Vendor • Customer • Legacy • DisclosureForms • eSignature • Util • Reporting • Stripe • ExposedOdata • Utility • QNS • SFA • Email_ConnectorExtension • DeepLinkExtension • ForgotPasswordExtension • AmazonS3ConnectorExtension • Notifications • Junkyard • DataDog <p><u>Illinois Solar for All</u></p> <p>The technical implementation employed is a combination of core and custom Salesforce objects, using FormAssembly forms and Salesforce pages with third-party integrations to create the Portal and SF platform. Logic is contained in custom code, Salesforce Flow and Process Builder.</p> <p><u>Functionality:</u></p> <ul style="list-style-type: none"> • User Creation and Login • Permissions based access • Submission and management of project lifecycles for all program subtypes • Creation and management of disclosures across supported languages and program subtypes • Submission and lifecycle for other capabilities e.g. job training, income verification • Reporting and Dashboards • Internal activity tracking and logs • Audit histories <p><u>Salesforce components:</u></p> <ul style="list-style-type: none"> • Core Salesforce components (Examples: Accounts, Contacts) • Custom components (Examples: Projects and Disclosures to support project lifecycle, objects supporting income verification, job training and compliance)
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	<ul style="list-style-type: none"> • Form Assembly custom forms • Used in Portal • Adobe Sign • Signature lifecycle management • Reporting components • Salesforce custom reports and dashboards <p>Logic housed in:</p> <ul style="list-style-type: none"> • Use of Salesforce Flow, Process Builder and Rules • Metadata and APEX code

Pricing

	Question	Answer
46	Can the IPA please explain how it will evaluate “price reasonableness” on a scale from 1-50?	The Agency defines price reasonableness as the fair price proposed by the Offeror for all services required to support the requirements defined as a Program Administration within this RFP; meaning prices that are not unreasonably high or low for such services in a competitive market. Additionally, the Agency is viewing price reasonableness as both a quantitative and qualitative assessment. The Agency’s determination on whether a price offered is reasonable will depend on our confidence that the bid accurately captures the real-world costs and complexity of the work of administration for both programs. Additionally, the Agency will seek to logically connect the costs outlined (and prioritized) in an Offeror’s pricing proposal to priorities outlined in the narrative of the Technical Proposal. Please see Section 3 of the RFP for more information about how the Agency will evaluate the pricing proposal.
47	If the Offeror elects to transition one of the programs prior to the start of year 2, how would you like the Offeror to show that on your pricing sheet to allow appropriate comparisons to other offerors who may not be transitioning a program in year 1?	As a component of the Pricing Proposal, Attachment NN, the Agency has instructed Offerors to include a narrative explanation of the underlying assumptions informing the Pricing Proposal. To the extent that one program is transitioned before another, the accompanying explanation should describe those assumptions and provide further clarification. Also, please refer to Question 46 which explains how pricing proposal ‘reasonableness’ is being concerned as part of the Offeror Proposal.

Equity & Labor

	Question	Answer
48	With respect to labor requirements and project labor agreements under P.A. 104-0458, what specific verification processes are expected of the Administrator?	The requirement of project labor agreements (“PLAs”) for Illinois Shines and ILSFA projects is a new requirement under P.A. 104-0458, the implementation of processes to verify PLAs are in place prior to construction are currently under development by the Agency. For projects that are subject to the Illinois Prevailing Wage Act, the Program Administrator verifies compliance through review of the Certified Transcripts of Payroll (“CTPs”) submitted by the Approved Vendor in the Part II application process. In its review, the Program Administrator will confirm that the AV has submitted copies of CTPs submitted to the Illinois Department of Labor or prepared in accordance with the Davis-Bacon Act if applicable, confirm the project address on the CTPs matches the project application, confirm that the CTPs are populated with employee and wage information, an amount of work that is proportionate to the size of the project, review to determine that the CTPs have not been manually edited, and ensure that CTPs for co-located projects are separately submitted. The Agency does not enforce the Prevailing Wage Act and therefore the Program Administrator is not responsible for reviewing the CTPs to confirm that the appropriate wage rates were paid. Additionally, please refer to Question 35 for additional information and context.

Systems & IT

	Question	Answer
49	Does the prohibition on use of AI extend to the development (not maintenance) of the portal since software development often relies on AI for coding and production?	The selected Offeror must comply with any applicable data privacy, copyright, Freedom of Information Act laws, and any applicable State of Illinois policies on the use of AI. However, the Agency understands that AI legal frameworks/policies will be evolving for the foreseeable future. The Agency stresses the importance that the use of any AI systems or software must be vetted by the IPA before implementation. In considering this, it is important to note that the Agency will consider the security implications of any potential use and the need for transparency regarding the extent of AI involvement in all work product. Further, the Agency does not permit the entry of confidential, proprietary, commercially sensitive or regulated data, or other information protected from disclosure under Illinois law to be entered into Generative AI tools. In addition, for purposes of getting a reasonable cost estimate, offerors should not assume AI will be allowed.
50	The RFP states that “generative Artificial Intelligence (AI) systems or software are not permitted to be used for performance of operational responsibilities and state mandated work”. Could the agency provide general guidance on acceptable vs. prohibited use cases of AI?	The Agency cannot provide a list of acceptable vs. prohibited uses of AI because as explained in the RFP and the response to Question 49, AI legal frameworks/policies will be evolving for the foreseeable future. Instead, the Agency stresses the importance that the use of any AI systems or software must be vetted by the IPA before implementation to ensure that it complies with data privacy, copyright, Freedom of Information Act laws and any applicable State of Illinois policies on the use of AI. In addition, for purposes of getting a reasonable cost estimate offerors should not assume AI will be allowed.
51	We request that the Agency provide any existing API documentation.	Approved Vendors and Designees have the option to use an API for the generation and signature of Distributed Generation and Community Solar Disclosure Forms. The Program utilizes Greenhouse, an API integration hub supporting integrations with the current portal through a library of published APIs. Swagger Documentation explaining the API endpoints and attributes for the generation and signature of Disclosure Forms is available to authorized users in the Greenhouse portal and a copy will be made available to Offerors upon request. Both programs utilize the PVWatts API to calculate estimated solar production from arrays. Documentation is available at: https://developer.nrel.gov/docs/solar/pvwatts/v8/ .
52	Will the IPA provide the successful bidder with the underlying code for the existing portals?	The IPA and the State of Illinois have sole and exclusive ownership over the existing portals, including intellectual property rights over the underlying code. The IPA will work with the successful bidder to transfer management of the existing portals, including providing underlying code for the existing portals.
53	Are there specific service-level expectations for maintaining existing program portals, websites, and application processing systems beyond the general requirement that the portal be fully operational by January 1, 2027?	It is the Agency’s expectation that systems and the support services currently utilized will be maintained at least through June 2027. Any systems taken over by the Joint Program Administrator from prior Program Administrators will remain fully operational throughout the transition period and into full-operation unless agreed upon between the Agency and Joint Program Administrator. Acceptable down-time could occur when transitioning between Program Years or if a major update or redesign is being undertaken and requires the system to be offline. If the Joint Program Administrator’s proposal is building and implementing a new system to replace one currently in use, the Agency foresees an overlap of systems prior to the phase-out and cutover to the new system. In such an instance, the old system may be maintained after cutover as a back-up, reference point, and/or for other similar reason. Information provided below specifically addresses each topic identified in the question: TRANSITION PERIOD Portal Consistent with normal program operations (explained below), the program portals are expected to be available to users around-the-clock except for planned outages. During the transition period, if a Program Administrator is proposing to utilize the current portal in place, systems must remain operational during the Program Year (2026-27) when transition will occur. Prospective portal updates and/or enhancements can be staged and tested; however, a scheduled outage must be defined and agreed to by the Agency prior to occurrence, and may best be aligned with the changing of Program Years (i.e., a pre-defined outage between the 2026-27 and 2027-28 Program Years). If the Program Administrator is proposing to develop a new portal, it should be operational by January 1, 2027 to enable parallel and stress testing between January and June 2027. It is likely

		<p>that during this stress-test period, the original portal will remain as the system of use; however, once the cutover to the new portal takes place, the incumbent portal must maintain the operational availability defined during “Post-Transition” explained below.</p> <p>Websites Similar to the portal, if the Program Administrator proposes simply taking over the current websites (rather than designing and moving to new sites) the expectation is that the current websites will remain operational around the clock for both programs. Any proposed or required updates to the current program websites shall first be staged and reviewed, with an agreed upon implementation schedule developed. As required, the Agency and Joint Program Administrator will work with current Program Administrators to update the website. Responsibilities for those updates will be predicated upon which Program Administrator – current or new – is managing the website.</p> <p>If new websites are being designed, the Program Administrator will work with the Agency to develop a cutover schedule, in coordination with the current Program Administrators. Prior to cutover, the current sites will be the primary sites and must maintain operational requirements (as summarized below). Upon cutover, the new website(s) must then assume the service level requirements defined below.</p> <p>Application Processing Systems The requirements of application processing systems are predicated upon whether the current systems are going to be maintained by the Joint Program Administrator, or if new systems are going to be developed. If the current systems are maintained, in full or in part, post-transition requirements (as summarized below) must be maintained during transition. Any upgrades or enhancements must be coordinated and agreed upon by the Agency (and coordinated with the current Program Administrators) prior to implementation. If a new application processing system is being developed, the Program Administrator will work with the Agency to develop a cutover schedule in coordination with the current Program Administrators. Prior to cutover, the currently application processing systems will be the primary system and must maintain operational requirements (as summarized below). Upon cutover, the new system must then assume the service level requirements defined below. If there is a circumstance where a partial cutover is proposed – for example a cutover for one of the two Programs – the expected service level shall be a hybrid of the two instances provided above.</p> <p><u>ONCE THE PROGRAM IS OPERATIONAL POST-TRANSITION</u></p> <p>Portal The program portals are expected to be available to users around the clock, with the exception of planned outages utilized to conduct routine maintenance. Currently, the Illinois Shines portal utilizes pre-planned and well-socialized maintenance windows so that users are aware in advance of downtime and can prepare accordingly. These maintenance windows are always conducted outside of operative business hours to minimize impact. The Agency expects to continue to use this precedent with the winning Offeror as it has worked well for users of the Illinois Shines portal thus far.</p> <p>The Agency recognizes that unplanned outages will occur. The expectation of the Agency is that these outages are as rare and as brief as possible. As the programs require a Disclosure Form to be signed by a customer before they sign a solar contract with an Approved Vendor, unavailability of Disclosure Forms through the portal has a real business impact to program participants that cannot be understated. Still, bugs in code exist thus the Agency understands that if there is a vulnerability introduced into the system that sometimes the portal must be manually made inaccessible to the public as the issue is resolved. These instances should be extremely rare, communicated to users as soon as possible, and full report of both how the issue arose, and mitigation plans for the future are expected.</p> <p>Websites The Agency’s expectation of around the clock uptime exists for the two program websites as well. As these are public programs, the Agency firmly believes that information must remain available at all times, unless there is an emergency. The Agency has not had any issues with this expectation in the past, even during times when program websites were being redesigned. During redesign periods a cutover day from the old to new site is planned for and communicated in advance, then executed on once the new site is ready.</p> <p>Application Processing Systems Like the program portal, outages of the application processing systems for either program have real financial and business impacts for program participants as both project developers</p>
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		<p>and their underlying customers depend on the incentive payouts that are delivered at the end of the application verification process. Due to this reliance, it is essential that the pace of application review and verification remain steady and dependable.</p>
<p>54</p>	<p>Can the Agency provide further detail on the scope and depth of data migration responsibilities, including historical application data, REC tracking data, and stakeholder records, to be transferred into the new administrator’s system?</p>	<p>The Illinois Shines and ILFSA Programs accept and process large amounts of data and files along with generating documents as well, throughout the course of a Program year. This information is currently stored on different platforms.</p> <p>The REC Contract, in all versions for Illinois Shines and ILSFA, contains multiple documents generated separately, including, but not limited to:</p> <ul style="list-style-type: none"> • Exhibit A – form of a Product Order to be completed for each batch of applications approved by the ICC • Schedule A – form completed for each project on its trade date with the approved proposed information of the project • Schedule B – form completed for each project on the date of energization with final contracted information of the project • Schedule C – form completed for each project upon a size change or removal • Schedule D – form completed for each project defining the invoicing provisions related to the project <p>For Illinois Shines, data is primarily stored in the program’s portal, SharePoint, and Salesforce. At the time of this response data estimates include, but are not limited to:</p> <ul style="list-style-type: none"> • ~1,700 Approved Vendor, Designee and Subcontractor SharePoint folders (each folder includes subfolders with files on Annual Report submissions, Invoices, Minimum Equity Standard Reports, Approved Vendor, Designee or Subcontractor Application and or Renewal information, etc. for multiple program years) • Over 800,000 Disclosure Form Records <ul style="list-style-type: none"> ○ Each Disclosure Form record includes ~100 alphanumeric fields of data, an unsigned PDF version of the Disclosure Form, and a signed version if the Disclosure Form was executed by the customer • Over 136,00 Application Records <ul style="list-style-type: none"> ○ Each application may have over 150 alphanumeric data fields, depending on the status of application submission and project category, and between 5 and 15 required document submissions (PDF and image files). Please refer to Appendix I and J of the Program Guidebook for all data fields: https://illinoisshines.com/wp-content/uploads/2025/06/Illinois-Shines-2025-26-Program-Guidebook-Final-18-April-2025-3June2025-correction-for-publication.pdf • Over 1,500 Contract Records <ul style="list-style-type: none"> ○ Including unsigned PDF versions of each generated contract record. Please refer to the following REC Contract version for an example on length and data fields: • Over 330,000 Exhibit A and Revised Schedule A Records <ul style="list-style-type: none"> ○ Including PDF versions of each record. Please refer to the Schedule A in the document linked above for data fields reference. • Over 120,000 Schedule B Records <ul style="list-style-type: none"> ○ Including PDF versions of each record. Please refer to the Schedule B in the REC Contract linked above for data fields reference. • Over 1200 Schedule C Records <ul style="list-style-type: none"> ○ Including PDF versions of each record. Please refer to the Schedule C in the document linked above for data fields reference. • Over 1000 Schedule D (Removal) Records <ul style="list-style-type: none"> ○ Including PDF versions of each record. Please refer to the Schedule D in the document linked above for data fields reference. • Over 20,000 Project Confirmation Records <ul style="list-style-type: none"> ○ These PDF files served as confirmation of ICC approval for applications submitted prior to 2022. These confirmations are currently sent via email. • Over 140,000 Quarterly Netting Statements (Invoice) Records <ul style="list-style-type: none"> ○ Each record includes up to 38 fields of data. • ~1,000 Disciplinary Action letters in PDF format <p>For ILSFA, data is primarily stored in the program’s portal, SharePoint, and Salesforce. At the time of this response data estimates include, but are not limited to:</p> <ul style="list-style-type: none"> • ~16,500 Disclosure Form Records

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		<ul style="list-style-type: none"> ○ Disclosure form generation includes 300 data fields, though a number of fields are inactive in an individual disclosure form depending on a project's type and offer details. • ~4,300 Project Records <ul style="list-style-type: none"> ○ Project records in Salesforce contain 366 potential data fields, though a number of fields are inactive in an individual project record depending on a project's type and status. • ~170 Contract Records <ul style="list-style-type: none"> ○ Currently generated and stored by the Illinois Shines Program Administrator. Including unsigned PDF versions of each generated contract record. Please refer to the following REC Contract version for an example on length and data fields: https://www.illinoisfa.com/wp-content/uploads/2024/07/Final-SFA-Utility-REC-Contract-4-22-24.pdf • ~1100 Exhibit A and Revised Schedule A Records <ul style="list-style-type: none"> ○ Currently generated and stored by the Illinois Shines Program Administrator. Including PDF versions of each record. Please refer to the Schedule A in the document linked above for data fields reference. • ~2800 Schedule B Records <ul style="list-style-type: none"> ○ Currently generated and stored by the Illinois Shines Program Administrator. Including PDF versions of each record. Please refer to the Schedule B in the document linked above for data fields reference. • 26 Schedule C Records <ul style="list-style-type: none"> ○ Currently generated and stored by the Illinois Shines Program Administrator. Including PDF versions of each record. Please refer to the Schedule C in the document linked above for data fields reference. • 16 Schedule D (Removal) Records <ul style="list-style-type: none"> ○ Generated and stored by the Illinois Shines Program Administrator. Include signed and unsigned versions and data files • ~140 Quarterly Netting Statements (Invoice) Records <ul style="list-style-type: none"> ○ Each record includes up to 14 fields of data • 32 Disciplinary Action letters in PDF format
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Communications & Outreach

	Question	Answer
55	<p>How many different types of external meetings are currently part of the program design (e.g., Illinois Solar for All Stakeholder Meetings or Illinois Shines Stakeholder Meetings), and how often do they currently occur? Does IPA believe these can be reduced, and if so, which? Are there meetings that must continue due to regulatory or policy requirements?</p>	<p>Please refer to Question 40 which provides information and expectations surrounding stakeholder engagement for both programs. Stakeholder engagement is a core component of both programs, ensuring efficient program operation, feedback from stakeholders helps address issues or consider new opportunities, and increases communication and understanding of the programs– to meet the intent of both programs. While Offerors may identify some meetings or engagements that are not necessary and can be eliminated, the Agency would prefer to Offeror proposals highlighting how their firm evaluates stakeholder engagements to ensure they meet their intended focus and results, information presented by stakeholders is processed and internalized, efficiency of the engagements are maintained, and determine if such engagements are successful and/or require adjustment. Efficiency in this context goes beyond the evaluation of the number of engagements and includes the success of the engagements to achieve their intended goal(s).</p> <p>Summary list of ILSFA external meetings:</p> <ul style="list-style-type: none"> • Monthly office hours for AVs • Weekly office hours for grassroots educators • Monthly consumer protection working group meetings (cross-program) • Quarterly ILSFA Advisory Committee Meetings • Annual Grassroots Educator cohort training and mid-year meeting • Stakeholder feedback workshops associated with annual updates of the ILSFA Approved Vendor Manual and other materials • Approved Vendor training on annual changes prior to a new program year • Project Selection virtual events when sub-program demand exceeds budget, up to three in a program year • Small and Emerging Business virtual and in-person workshops, 3-5 per year

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		<p>Summary list of Illinois Shines external meetings:</p> <ul style="list-style-type: none"> • Every other week office hours for AVs • Monthly consumer protection working group meetings (cross-program) • Four AV roundtables per year • Annual Program Year opening webinar • Annual MES compliance webinar • Annual REC Contract Annual Report webinar • Annual Community Solar project selection webinars • Occasional meetings with EJC community stakeholders to overview program • Additional webinars/learning sessions and working groups as needed, usually in response to trends observed in program
56	<p>Are there certain areas of Illinois and/or demographics that are currently needing focused outreach due to minimal program participation for Illinois Solar for All and Illinois Shines?</p>	<p>The Agency regularly engages the current Program Administrators to understand how progress is being made with the Programs, where stakeholder and customer engagement is proving active and successful, and where further engagement and focus is necessary to improve participation. It is with this understanding that focus evolves, subject to the ebb and flows of customer and Approved Vendor engagement.</p> <p>Currently, the Illinois Solar for All Program has focused and continues to focus on engagement in southern Illinois. The Agency has found, through information provided by Grassroots Educators, that there appears to be interest in residential and community solar participation, but there are few ILSFA Approved Vendors that serve southern Illinois, limiting the development potential in this region. The lack of available downstate ILSFA Approved Vendor options has also frustrated grassroots education efforts, where Grassroots Educators are not comfortable promoting the Program when there are few ILSFA Approved Vendors to serve potential customers. Additionally, participation in the Residential (Large) sub-program also remains low.</p> <p>The Illinois Shines Program has identified and is specifically targeting barriers experienced by public schools and public school districts when this customer group is considering the installation of solar. Notably, the Public Schools category has underperformed since its creation in 2022. An outreach plan has been developed and is being implemented, focused on addressing currently identified barriers. Please refer to the following document to read the 2025-26 Public Schools Outreach Action Plan: https://illinoisshines.com/wp-content/uploads/2025/09/Public-Schools-Outreach-Plan-v250926.pdf</p> <p>Additionally, as part of the Agency’s efforts to increase Illinois Shines awareness, the Program has established an outreach plan to connect with Equity Investment Eligible Communities (“EIECs”), potential Equity Eligible Persons (“EEPs”), Equity Eligible Contractors (“EECs”) and Department of Commerce and Economic Opportunity (“DCEO”) workforce hubs.</p>
57	<p>Please outline the approval workflows, points of review, and typical turnaround times for website content, marketing collateral, and paid advertising campaigns. In addition, clarify whether the level of oversight and review is expected to evolve over time as the awardee gains program familiarity, or whether a standardized approval process will apply for the full term of the contract.</p>	<p>The individuals involved with document drafting and review on both the Agency and Program Administrator teams vary depending on the document’s substance and audience. For most program materials and updates, the Joint Program Administrator will be expected to complete initial drafts before providing such drafts to the Agency. Turnaround times for document review vary greatly depending on the document, its length and complexity, and competing workloads and deadlines. Speaking very generally and in ideal conditions, short and simple documents (e.g., announcements, marketing materials) are reviewed within a week. Review of large and complex materials, such as the process to update the Approved Vendor Manual or Project Selection Protocol, would have an ideal turnaround of two to four weeks. These materials are reviewed by more experienced staff and legal counsel, each dedicating many hours to review, with consideration of program direction.</p> <p>The Agency has a strong foundational commitment to ensure that information provided is transparent, timely, and accurate to maintain program participant and broader stakeholder confidence and integrity in the programs. While the Agency expects that the Joint Program Administrator will need less direct oversight on certain activities as proficiency in processes is achieved, the Agency also expects that it will always be highly involved in oversight of both programs and continually looking for opportunities to improve program performance and the participant experience. The Agency expects the Joint Program Administrator will develop and implement a through action plan and schedule to ensure marketing, communications, and related content is updated and reviewed as required and in an efficient manner. Further, where appropriate, the Agency expects templates and standard operating processes to be developed and implemented – making the update of such materials more formulaic, efficient, and transparent to the Joint Program Administrator and Agency teams. In conclusion, the Agency expects the Joint Program Administrator to deliver top quality work product to the Agency so review can be performed as efficiently as possible with minimal reworking needed.</p>

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