

STATE OF ILLINOIS REQUEST FOR PROPOSALS

ILLINOIS POWER AGENCY

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

Reference Number 26-RFP-01

The Illinois Power Agency (“Agency” or “State”), an independent state agency, is tasked with developing and implementing procurement plans to meet the supply requirements of Illinois electric distribution utilities and to achieve the goals of the State’s renewable energy portfolio standard. Guided by provisions contained in Sections 1-56 and 1-75 of the Illinois Power Agency Act, and as detailed in the Agency’s Long-Term Renewable Resources Procurement Plan, the Agency is responsible for the administration of certain programs to incentivize the development of new photovoltaic systems statewide. **The Agency is issuing this request for proposals (“RFP”) seeking qualified and responsible expert firms (“Offerors”) to serve as the combined Program Administrator for the Illinois Shines and Illinois Solar for All (“ILSFA”) programs.**

This Solicitation represents the second step in the Agency’s process of selecting a Program Administrator. Qualified Offerors have been identified based on the responses to the prior related Request for Qualifications (26-RFQ-01) and have been invited to submit proposals in response to this more detailed Request for Proposals (26-RFP-01).

More information about Illinois Shines and ILSFA programs and the responsibilities of their Program Administrators can be found in Section 1-56(b) of the Illinois Power Agency Act (20 ILCS 3855), Section 1-75(c)(1)(M) of the Illinois Power Agency Act (20 ILCS 3855), Section 16-111.5(b) of the Public Utilities Act (220 ILCS 5), and the Agency’s Long-Term Renewable Resources Procurement Plan (“Long-Term Plan” or “Plan”).¹ The Agency’s website can be found at <https://ipa.illinois.gov/>, and the current program websites can be found at <https://www.illinoissfa.com/> and <https://illinoisshines.com/>. Additionally, please find additional targeted information on each program in Appendices 1 through 9.²

BACKGROUND: Public Act 99-0906 (Future Energy Jobs Act, or “FEJA”), which was enacted into law on December 7, 2016 and became effective on June 1, 2017, created two programs to incent the development of distributed generation and community solar projects: the Illinois Solar for All program, and the Adjustable Block program (rebranded as “Illinois Shines” in 2023). The enactment of Public Act 102-0662 (the Climate and Equitable Jobs Act or “CEJA”) in 2021 and recently-signed Public Act 104-0458 (the Clean and Reliable Grid Affordability Act, or “CRGA”), which becomes effective on June 1, 2026, serve to further revise, expand, and modify both Illinois Shines and ILSFA.

Illinois Shines is designed for the “procurement of renewable energy credits from new photovoltaic projects that are distributed renewable energy generation devices and new photovoltaic community renewable generation projects.”³ These projects are incented through the procurement of Renewable Energy Credits (“RECs”), or the environmental attributes created through the production of one megawatt

¹ See: <https://ipa.illinois.gov/content/dam/soi/en/web/ipa/documents/20251031-modified-2024-long-term-renewable-resources-procurement-plan-31-october-2025.pdf> for the current version of the Long-Term Plan. Illinois Shines is described primarily in Chapter 7, and ILSFA is described primarily in Chapter 8. The Agency filed its 2026 Long-Term Plan on October 20, 2025 for Illinois Commerce Commission Approval. This 2026 Plan will cover proposed program activities in the 2026-27 and 2027-28 Program Years, and can be found here: <https://www.icc.illinois.gov/docket/P2025-0945/documents/372051/files/652331.pdf>.

² Available at: <https://ipa.illinois.gov/content/dam/soi/en/web/ipa/documents/26-rfp-01-rfp-appendices.pdf>.

³ 20 ILCS 3855/1-75(c)(1)(K).

hour of electricity by renewable resources. These incentives are governed by 15-year or 20-year REC delivery contracts, with the added revenue and revenue certainty from those contracts supporting the development of new solar projects. Illinois law further requires that Illinois Shines “be designed to provide a transparent schedule of prices and quantities to enable the photovoltaic market to scale up and for renewable energy credit prices to adjust at a predictable rate over time.”⁴ The Program launched in early 2019 to support distributed generation and community solar projects and was expanded under CEJA, through the creation of additional program categories: Public Schools, Community-Driven Community Solar, and Equity Eligible Contractor (“EEC”). CEJA also added significant consumer protections, prevailing wage requirements, and equity requirements. Equity requirements included a “Minimum Equity Standard”⁵ applicable to the project workforce of participating companies to ensure that the program serves participants and workers in a fair and equitable manner. Program requirements and REC contract award goals for the Illinois Shines program can be found in Chapter 7 of the IPA’s Long-Term Renewable Resources Procurement Plan.⁶

ILSFA has a structure similar to Illinois Shines with a core focus “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.”⁷ ILSFA has program categories for distributed generation projects that serve income-eligible households, non-profits and public facilities, and income-eligible community solar projects. ILSFA also supports grassroots education activities across Illinois. For ILSFA, CEJA brought new provisions for consideration of energy sovereignty,⁸ an increased focus on supporting small and emerging businesses, and expanded requirements related to job training. More information on Program requirements and annual ILSFA program budgets can be found in Chapter 8 of the IPA’s Long-Term Renewable Resources Procurement Plan.⁹

The purpose of this RFP is to seek responses from Offerors that describe in detail the proposed approaches that will be employed to develop, implement, maintain, and refine the services and deliverables listed in Sections 2.2 and 2.3 of this RFP. Proposed approaches must also include 1) transitional activities to transfer work from incumbent Program Administrators to stand-up the programs and 2) proposed opportunities to implement program enhancements. Approach details must be inclusive of the specific resources available to execute those services and deliverables, and the proposed price for all services and deliverables.

The Agency will score responses to the RFP to determine the Offeror best suited to serve as the Joint Program Administrator. That selection is subject to approval by the Illinois Commerce Commission.¹⁰ If selected through this RFP process, the selected Offeror will be expected to enter into a binding contract

⁴ Id.

⁵ More information on the Equity Accountability System, including the Minimum Equity Standard can be found here: <https://illinoisshines.com/equity-accountability-system-hub/>.

⁶ See Chapter 7: <https://ipa.illinois.gov/content/dam/soi/en/web/ipa/documents/20251031-modified-2024-long-term-renewable-resources-procurement-plan-31-october-2025.pdf>.

⁷ 20 ILCS 3855/1-56(b)(2).

⁸ More information on Energy Sovereignty can be found in Sections 8.2.4 and 8.5.1 of the Final Modified 2024 Long-Term Plan: <https://ipa.illinois.gov/content/dam/soi/en/web/ipa/documents/20251031-modified-2024-long-term-renewable-resources-procurement-plan-31-october-2025.pdf>.

⁹ See Chapter 8: <https://ipa.illinois.gov/content/dam/soi/en/web/ipa/documents/20251031-modified-2024-long-term-renewable-resources-procurement-plan-31-october-2025.pdf>.

¹⁰ 20 ILCS 3855/1-75(a)(4), (6).

with the Agency. The contract resulting from this solicitation process shall allow the two programs to transition to the awarded Offeror on an overlapping schedule. The Agency has preliminarily defined a transition approach with both Illinois Shines and ILSFA transitioning throughout 2026 and into 2027, with the IL Shines Program potentially transitioning first and elements of the ILSFA Program transitioning with the IL Shines Program and others transitioning into and throughout 2027. However, the Agency will accept proposals that offer an alternative approach and schedule for which an Offeror believes is an improved approach. Any such proposed changes in transitional schedule shall be supported by detailed explanations supporting the proposed change, inclusive of adjustments to offeror resource demands, prospective improvements in efficiency of the transition, and impacts to price. Any alternative transitional schedule must include the Illinois Shines program being fully transitioned by no later than June 2027, with an expectation the portal be operational by January 1, 2027. The contract term between the Agency and Offeror will begin at contract execution, likely to occur in or about June 2026 which may include a short transitional period. The initial term of the contract will be two years followed by the prospect of up to three annual extensions for a full term of up to five (5) years.¹¹

Please read the entire Solicitation package and submit a Proposal in accordance with the instructions defined herein.¹² All forms and signature areas contained in the proposal package must be completed in full and submitted with the checklist, technical proposal, pricing proposal, disclosures, and various attachments, which combined will constitute the Proposal. The Proposal will be incorporated into and made part of any subsequent Agency-Offeror contract. All elements of the Offeror Proposal are binding and shall be utilized as key components of defined statements of work and budget, unless otherwise agreed to by both the Agency and Offeror during contracting. Do not submit the instruction pages with Proposals. Offerors should retain the Instructions and a copy of the Proposal for future reference. **Please note that the terms in the attachments control unless they contradict with the RFP, in which case the RFP controls.**

¹¹ The State of Illinois operates on a Fiscal Year that starts July 1 and concludes June 30. For example, if the contract start date is June 1, 2026, the transitional term would be June 1, 2026 through June 30, 2026. The initial term would run July 1, 2026 through June 30, 2028.

¹² See the RFP section of <https://ipa.illinois.gov/renewable-resources/stakeholder-engagement.html> for all materials related to this RFP.

SOLICITATION OUTLINE

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¹³ Available at: <https://ipa.illinois.gov/content/dam/soi/en/web/ipa/documents/26-rfp-01-rfp-attachments.pdf>.

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¹⁴ Available at: <https://ipa.illinois.gov/content/dam/soi/en/web/ipa/documents/26-rfp-01-rfp-appendices.pdf>.

INSTRUCTIONS

- 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), Illinois Public Higher Education Procurement Bulletin (www.procure.stateuniv.state.il.us/), Transportation Procurement Bulletin (<https://idot.illinois.gov/procurement.html>) or the Illinois Capital Development Board Bulletin (<https://cdb.illinois.gov/procurement.html>) (collectively and individually referred to as “Bulletin”). The Agency will also post this Solicitation and related documents and announcements to its website (ipa.illinois.gov). Procurement information may not be available in any other form or location. Offeror is responsible for monitoring the Bulletin selected by the Agency for this procurement. The Agency will not be held responsible if Offeror fails to receive the optional e-mail notices.
- I.3 SOLICITATION CONTACT:** The individual listed below shall be the single point of contact for this Solicitation. Unless otherwise directed, Offerors should only communicate with the Solicitation Contact. The Agency shall not be held responsible for information provided to or from any other person.

Solicitation Contact: James M. Rouland	Phone: 312-814-8611
Agency: Illinois Power Agency	Fax: 312-814-0926
Street Address: 180 N. Wabash Ave., Suite 500	TDD: 866-846-5276
City, State Zip: Chicago, IL 60601	E-mail: IPA.Contracts@illinois.gov

Questions or comments regarding this RFP should be timely directed in writing to the Solicitation Contact identified above. Communications are preferred to be via email as defined above, with the subject header as follows: **[Offeror Name] – IPA Joint Program Administrator RFP [Response/Question/Comment]**. Do not discuss the Solicitation or any proposal, directly or indirectly, with any State officer or employee other than the Solicitation Contact, the individuals identified in Section I.17, or as directed by the Solicitation Contact.

- I.4 OFFEROR QUESTIONS AND AGENCY RESPONSE:** All Offeror questions that pertain to this Solicitation must be submitted in written form and submitted to the Solicitation Contact no later than January 30, 2026, 5 PM Central Prevailing Time (“CPT”). Written questions received and Agency responses may be posted as an Addendum to the original Solicitation on the Bulletin; only

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these written answers to questions shall be binding on the Agency. Offerors are responsible for monitoring the Bulletin.

The Agency will also hold a Workshop for prospective Offerors on January 27, 2026 at 11 AM CPT. During this workshop the Agency will provide a summary overview of this RFP and provide Offerors with the opportunity to ask preliminary questions and clarifications. Offeror questions presented to the Agency through the Workshop or through any interview(s) that may be scheduled by the Agency will be documented on a best effort basis, with those questions provided in the Workshop being posted as part of the same process with questions submitted in writing by Offerors to ensure all stakeholders are presented with the same information. Any Offeror-specific names and/or confidential information in response to these questions will first be removed before posting.

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

Proposal Due Date & Time:

Date: March 13, 2026; Time: 5 PM CPT

Submit/Deliver Proposals To:

Agency: Illinois Power Agency
Subject: [Offeror Name] – IPA Joint Program Administrator RFP Submission
Email: IPA.Contracts@illinois.gov

- I.6 INSTRUCTIONS:** Responses to this RFP must be submitted via e-mail to the Solicitation Contact, James M. Rouland, (IPA.Contracts@illinois.gov) by the Proposal Due Date/Time. Response documents may be attached to the e-mail, or a link to download the documents may be included in the submittal email. E-mail submissions should include a subject line with the Solicitation Title and Offerors Name, e.g. **[Offeror Name] – IPA Joint Program Administrator RFP Submission**

Responses shall include all of the following Sections and Attachments:

Sections:

- Section 1 – Proposal Checklist and Signature Page
- Section 2 – Technical Proposal
- Section 3 – Pricing Proposal

Attachments:

- State Board of Elections Certificate of Registration (Attachment AA)
- Authorization to do Business in Illinois (Attachment BB)
- Illinois Department of Human Rights Public Contract Number (Attachment CC)
- Standard Terms and Conditions (Attachment DD)
- Subcontractor Disclosures (Attachment EE)

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- Standard Certifications (Attachment FF)
- Financial Disclosures and Conflicts of Interest (Attachment GG)
- Disclosure of Business Operations with Iran (Attachment HH)
- Business and Directory Information (Attachment II)
- References (Attachment JJ)
- Solicitation and Contract Terms and Conditions Exceptions (Attachment KK)
- Taxpayer Identification Number (Attachment LL)
- Business Enterprise Program, Minorities, Females, Persons with Disability Participation and Utilization Plan (Attachment MM)
- Pricing Proposal Details Spreadsheet (Attachment NN)

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. Sections 1-56 and 1-75 of the Illinois Power Agency Act (20 ILCS 3855) are applicable to this Solicitation. Please also be mindful of pending changes to Sections 1-56 and 1-75 found in Public Act 104-0458, set to take effect June 1, 2026, although those changes do not alter the specific authority authorizing this Solicitation.

I.8 PUBLIC RECORDS AND REQUESTS FOR CONFIDENTIAL TREATMENT: Proposals become the property of the Agency. Proposals, including late submissions will not be returned. **All Proposals 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 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 Proposal with proposed confidential information redacted. This redacted copy must describe the general nature of the material removed and shall retain as much of the Proposal 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 Proposal 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 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 Proposal as non-responsive to the

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Solicitation. Submitting a Proposal 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 Proposal. Qualified 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 the process outlined in Section 1-75(c) of the Illinois Power Agency Act (20 ILCS 3855/1-75(c)), Section 1-56(b)(6) of the Illinois Power Agency Act (20 ILCS 3855/1-56(b)(5)), and Section 16-111.5(b)(5) of the Public Utilities Act (220 ILCS 5/16(b)(5)). As a result of this RFP, the Agency may select the winning Offeror to administer the Illinois Shines and ILSFA programs. 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 26-RFP-01 BY REFERENCE:** This Solicitation (26-RFP-01) and associated Offeror's Proposal, and 26-RFQ-01 and the associated Offeror's Submittal of Qualifications will be incorporated into and made part of any subsequent contract by reference.
- I.12 PREQUALIFICATION TO RESPOND TO SUBSEQUENT RFP:** Based on the evaluation of responses to 26-RFQ-01, only Qualified Offerors may respond to this RFP.
- I.13 EVALUATION OF RESPONSIVENESS:** The Agency determines whether proposals completely and satisfactorily meet the responsiveness requirements of this Solicitation. Submittals that fail to meet minimum Responsiveness and Responsibility requirements will not be considered for subsequent evaluation. The Agency shall assess the information provided and the quality of that information when evaluating proposals. If the Agency finds a failure or deficiency, the Agency may reject the proposal or reflect the failure or deficiency in the evaluation. The Agency reserves the right to request additional information or clarification as it deems necessary to make decisions in the best interests of the Agency.

RESPONSIVENESS: A responsive Offeror is one whose proposal conforms in all material respects to this Solicitation, and includes all required information, forms, and disclosures. Information, forms and disclosures include and may not be limited to:

- Proposal Checklist (Section 1)
- Technical Proposal (Section 2)
- Pricing Proposal (Section 3)
- Attachments AA to NN

The Agency will determine whether the Proposal meets the stated requirements. Differences or deviations that have negligible impact on the suitability of the service to meet the Agency's needs may be accepted or corrections allowed. With the exception of late submissions which are not permitted and other requirements that by law must be part of the submission, the Agency may require that an Offeror correct identified deficiencies as a condition of further evaluation. If no Offeror meets a particular requirement, the Agency may waive that requirement.

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- I.14 INTERVIEW/PRESENTATION.** The Agency may invite Offerors to an in-person or video conference interview or presentation to answer questions about the Proposal.

The Agency reserves the right to create a list of Offerors to be invited to an interview or presentation. Only those vendors invited to an interview will be considered for further evaluation and selection for contract award.

- I.15 EVALUATION OF ELEMENTS OF RESPONSIBILITY.** The table below shows elements of responsibility for which the Agency will evaluate proposals—including both the maximum points awarded (1,000) and the minimum points needed for each requirement. Proposals will be scored based on the strength of addressing these elements, with their relative weights in points. In addition to the elements that are scored, there are two criteria that are evaluated on a pass/fail basis. Failure to obtain the minimum number of points needed in any element of responsibility, or to pass either of the two pass/fail criteria (following any requested curing of any deficiencies as described in Section I.13 above) will automatically disqualify the entire proposal.

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	
Totals		1,000	210

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- I.16 PROTEST PROCESS:** Any person may submit a protest relating to the notice of the RFP or the terms of the RFP. Protests relating to the notice or terms of the RFP must be received within ten (10) business days after release of the RFP. An Offeror may protest the rejection of its offer or an award to another Offeror. Any protest related to the rejection of an offer or an award to another Offeror must be received by close of business no later than seven (7) business days after the protesting party knows or should have known of the facts giving rise to the protest to ensure consideration. Any notice published to the IPA, Illinois Shines, or ILSFA website(s) establishes the date for the subject matter of the notice.

Protest submissions must be concise and logically arranged; provide a statement of reasons for the protest specifically identifying any allegedly material violation of the IPA Act, another relevant Illinois law, or the terms of the RFP; and include any supporting facts, arguments, evidence, and documents. Protests that do not establish legally sufficient grounds for protest— that is, a material violation of the IPA Act, other relevant Illinois law, or the terms of the RFP – or that do not include supporting evidence will be denied. Note that this RFP is not subject to the Illinois Procurement Code, and protests based solely on rules applicable under that Code will not be considered.

Within one (1) business day of receiving the protest submission, the RFP Solicitation Contact will assign a staff member from IPA that was not involved in drafting the RFP or evaluating offers to review the protest submission and the RFP. If the protest relates to a rejection of an offer, the staff member will also review all relevant offers submitted in response to the RFP and any other relevant information such as evaluation materials. That staff member will make a recommendation to the Agency's Director within five (5) business days of being assigned to review the protest. The Director will make the final decision as to the determination of the protest within three (3) business days. The IPA will resolve the protest by means of a written determination. In determining the appropriate determination, the Director shall consider whether the protestor established sufficient grounds for protest; the seriousness of the procurement deficiency, if any; the degree of prejudice to other parties or to the integrity of the competitive procurement system; the good faith of the parties; the urgency of the procurement; and the impact of the recommendation on the IPA's mission.

- I.17 MINORITY, FEMALE, AND PERSONS WITH DISABILITY PARTICIPATION AND UTILIZATION PLAN:** This Solicitation contains a goal to include businesses owned and controlled by minorities, females, and persons with disabilities in the procurement and contracting processes. The utilization goal is 10% of the contract amount and is based on the availability of certified vendors listed in the Supplier Diversity Portal Management system (a platform managed by the Commission for Equity and Inclusion) and the State of Illinois' BidBuy vendor database to perform the anticipated direct subcontracting opportunities of this contract. In addition to the other award criteria established for this contract, the Agency will award this contract to an Offeror that meets or exceeds this goal or demonstrates documented good faith efforts to meet this goal.

The Agency takes an Offeror's commitment to achievement of this goal very seriously. Offerors shall submit a Utilization Plan that meets this goal. Any failure to submit a Utilization that is incomplete or fails to achieve the 10% utilization goal will result in the offer being deemed non-responsive (see Attachment MM for a link to the Utilization Plan template and additional guidance). If the Agency finds during its review of a submitted Offeror Utilization Plan that the plan is complete and responsive but includes other deficiencies or needs for clarification, the Agency will implement the cure provisions described below. Any submitted Utilization Plan that results in a determination that the submission is non-responsive will be summarily rejected by the Agency.

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There are a variety of ways to demonstrate utilization:

- 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 in Part I of the Utilization Plan (Bidder/Offeror Signed Commitment)
- An Offeror who elects to utilize BEP certified subcontractor(s) to meet the goal must provide executed Subcontractor Participation Agreements for all such subcontractors as part of the Utilization Plan. Subcontracting Participation Agreements should have terms that runs through June 30, 2028, which is the expected end of the initial term for the contract to be awarded under this RFP.
- An Offeror who selects the Good Faith Efforts option for the Utilization Plan, must fully complete the “Demonstration of Good Faith Efforts to Achieve Goal and Request for Waiver” and the “Good Faith Efforts Contact Log” (located in Part III of the Utilization Plan) as part of their submittal.¹⁵

The awarded Offeror will be required to submit a new Utilization Plan with updated Bidder/Offeror Signed Commitments and Subcontractor Participation Agreements for approval as part of any extension of the term of the contract after the initial term.

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: <https://cei.illinois.gov/vendor-resources/get-bep-certified.html>.

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

All questions regarding the subcontracting goal must be directed to the Agency BEP Liaison prior to submission of proposals.

BEP Liaison: Kate Clifford
Phone Number: 312-814-9291
E-mail Address: kate.clifford@illinois.gov

All questions regarding BEP certification must be directed to the CEI BEP Certification prior to submission of proposals.

CEI Certification Manager: Carlos Gutierrez
Phone Number: 312-814-5521
E-mail Address: Carlos.Gutierrez@Illinois.gov

¹⁵ See https://cei.illinois.gov/content/dam/soi/en/web/cei/documents/GOOD_FAITH_EFFORTS_GUIDANCE.pdf for more information on Good Faith Efforts.

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Offerors who submit proposals in response to this RFP may be given a period after the proposal opening date to cure deficiencies in the Utilization Plan unless mandated by statute or regulation.

Deficiencies that may be cured include: (i) scrivener's errors, such as transposed numbers; (ii) information submitted in an incorrect form or format; (iii) mistakes resulting from failure to follow instructions or to identify and adequately document good faith efforts taken to comply with the utilization plan; or (iv) 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 note that BEP vendors, whether self-performing or subcontractors, must be certified in the five-digit NIGP Code listed in Attachment MM prior to Submission of Proposal to this RFP.

Go to: <https://cei.illinois.gov/vendor-resources/get-bep-certified.html> for complete requirements for BEP certification.

If an entity requires an expansion request to become certified in the NGIP Code listed in this solicitation, please apply for an expansion application, located on the State's Supplier Diversity Portal (<https://cei.illinois.gov/supplier-diversity-management-system.html>).

Expedited processing may be requested of CEI's Certification Manager.

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 X, 2026).

Go to: <https://cei.illinois.gov/content/dam/soi/en/web/cei/documents/bep-compliance/NIGP%20Code%20Revision%20Request%20Form.pdf> for NGIP Code Revision Requests. Please send NGIP Code Revision Request Forms directly to the Agency's BEP Liaison, Kate Clifford at kate.clifford@illinois.gov.

I.18 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 response to this Solicitation, Offerors must identify subcontractors with an expected annual value of more than \$50,000 and the expected amount of money each will receive under the contract. A Subcontractor Disclosure form is provided in the Solicitation as Attachment EE.

I.19 TIMELINE: The Agency plans to follow the timeline below to contract for the professional services of a Joint Program Administrator:

- RFP Issued: January 16, 2026
- RFP Offerors Virtual Workshop: January 27, 2026, 11 AM CPT¹⁶
- Deadline to submit written questions: January 30, 2026, 5 PM CPT

¹⁶ Please send an e-mail to the Solicitation Contact listed above to request the call-in number for this call

INSTRUCTIONS

- NGIP Code Revision Requests Due: March 5, 2026, 5 PM CPT
- RFP Responses Due/Proposal Submissions Due: March 13, 2026, 5 PM CPT
- Award made: May 15, 2026 (Tentative)
- Contract start date: June 1, 2026 (Tentative)

SECTION 1 – CHECK LIST

1. PROPOSAL CHECK LIST

By completing and signing this form, the Offeror makes a Proposal 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 proposal. Offeror must mark each blank below as appropriate. Offeror understands that failure to submit all required documents is cause for disqualification.

CHECKLIST:

- 1.1. SOLICITATION REVIEW:** Offeror reviewed the Solicitation, including all referenced documents, 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 26-RFP-01 BY REFERENCE:** Offeror acknowledges that this Solicitation (26-RFP-01) and Offeror's Proposal 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 Offer.
☐ Yes ☐ No ☐ N/A
- 1.4. SUBMISSION OF TECHNICAL PROPOSAL – Section 2:** Offeror is submitting a complete and responsive technical proposal, via a properly labeled e-mail, to the correct location, and by the due date and time.
☐ Yes ☐ No
- 1.5. SUBMISSION OF PRICING PROPOSAL – Section 3:** Offeror is submitting a pricing proposal, including Attachment NN, in a properly labeled container or e-mail, to the correct location, and by the due date and time.
☐ Yes ☐ No
- 1.6. STATE OF ILLINOIS STATE BOARD OF ELECTIONS CERTIFICATION:** If required to register, Offeror included a copy of its State Board of Elections Certificate of Registration, Attachment AA.
☐ Yes ☐ No ☐ N/A
- 1.7. STATE OF ILLINOIS AUTHORIZATION TO DO BUSINESS IN ILLINOIS:** Offeror included a copy of its Certificate of Good Standing, Attachment BB.
☐ Yes ☐ No ☐ N/A
- 1.8. STATE OF ILLINOIS DEPARTMENT OF HUMAN RIGHTS PUBLIC CONTRACTS NUMBER:** Offeror completed and submitted the applicable IDHR Public Contract Number, Attachment CC.
☐ Yes ☐ No

SECTION 1 – CHECK LIST

- 1.9. STATE OF ILLINOIS STANDARD TERMS AND CONDITIONS:** Offeror reviewed the State of Illinois Standard Terms and Conditions, Attachment DD.
☐ Yes ☐ No
- 1.10. STATE OF ILLINOIS SUBCONTRACTOR DISCLOSURES:** Offeror reviewed, completed and signed the Subcontractor Disclosures form, Attachment EE.
☐ Yes ☐ No ☐ N/A
- 1.11. STATE OF ILLINOIS STANDARD CERTIFICATIONS:** Offeror reviewed and signed the State of Illinois Standard Certifications, Attachment FF.
☐ Yes ☐ No
- 1.12. STATE OF ILLINOIS FINANCIAL DISCLOSURES AND CONFLICTS OF INTEREST:** Offeror completed, signed and submitted the Financial Disclosures and Conflicts of Interest forms, Attachment GG.
☐ Yes ☐ No
- 1.13. STATE OF ILLINOIS DISCLOSURE OF BUSINESS OPERATIONS WITH IRAN:** Offerors completed and submitted the Disclosure of Business Operations with Iran form, Attachment HH.
☐ Yes ☐ No
- 1.14. STATE OF ILLINOIS BUSINESS AND DIRECTORY INFORMATION:** Offeror completed and submitted the Business and Directory Information form, Attachment II.
☐ Yes ☐ No
- 1.15. STATE OF ILLINOIS REFERENCES:** Offeror completed and submitted references, Attachment JJ.
☐ Yes ☐ No
- 1.16. STATE OF ILLINOIS SOLICITATION AND CONTRACT TERMS AND CONDITIONS EXCEPTIONS:** Offeror completed, signed and submitted the Solicitation and Contract Terms and Conditions Exceptions form, Attachment KK.
☐ Yes ☐ No
- 1.17. STATE OF ILLINOIS TAXPAYER IDENTIFICATION NUMBER:** Offeror completed, signed and submitted the Taxpayer Identification Number form, Attachment LL.
☐ Yes ☐ No
- 1.18. STATE OF ILLINOIS MINORITY, FEMALE, PERSONS WITH DISABILITIES STATUS PARTICIPATION AND UTILIZATION PLAN:** Offeror provided a Participation Plan in accordance with the State of Illinois Minorities, Females and Persons with Disabilities Participation and Utilization Plan, Attachment MM.
☐ Yes ☐ No

SECTION 1 – CHECK LIST

- 1.19. PRICING PROPOSAL DETAILS SPREADSHEET:** Offeror provided the Pricing Proposal Details Spreadsheet contained in Attachment NN to support the Price Quotes contained in Sections 3.1, 3.2 and 3.3.

☐ Yes ☐ No

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

Offeror has signed this Proposal: bottom of Sections 1, 2, and 3 and all applicable disclosures and attachments.

☐ Yes ☐ No

Signature of Authorized Representative: _____

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

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

SECTION 2 - TECHNICAL PROPOSAL

2. **Specifications and Technical Proposal** – Please refer to Appendices 1 through 8¹⁷ for background information on Illinois Shines and Illinois Solar for All that can be used to support the development of the Technical Proposal.

2.1. Goal: The Agency seeks a qualified Program Administrator to implement and operate both the Adjustable Block Program (also known as Illinois Shines) and Illinois Solar for All Program in full capacity as a Program Administrator. The Program Administrator will assist the Agency in meeting its mission to carry out the objectives of the Illinois Shines program and the Illinois Solar for All program in accordance with Section 1-75(c) and Section 1-56(b) of the Illinois Power Agency Act (20 ILCS 3855). In addition to the predominant objective of this RFP provided above, this RFP has been purposefully issued to contract for a Joint Program Administrator with the goal of improving the efficiency of both Programs – operation, updates, and implementation – while also reducing costs to implement and manage the Programs. Importantly, this pursuit is not just intended to merge the operations of the Illinois Shines and Illinois Solar for All programs; instead it is for identifying the host of program efficiencies that can be implemented to improve the Programs and make them more accessible to Approved Vendors, Designees, and customers.

2.2. Services Required: This RFP is seeking a qualified Program Administrator to administer both Illinois Shines and Illinois Solar for All. This role includes an expectation that the selected Offeror has the required core competency and technological solutions to run high-volume incentive contract awards and community engagement programs. Effective administration is expected to include the ability to efficiently and accurately process applications, provide a sophisticated and well-developed approach to ensuring consumer protections, ensure critical equity and labor requirements are met, and adequately track, understand, and adjust to dynamic market conditions to progress the Programs and achieve specified goals.

Any selected Joint Program Administrator is expected to be capable of:

- Operational functions that shall include but are not limited to: the development and ongoing update of forms and materials associated with the submission of program applications; management, review, and implementation program requirements, processes and rules; development and maintenance of websites; development, maintenance, and enhancement of databases, technical systems and infrastructure, and stakeholder portals which includes the management of various applicant interfaces necessary for successful program administration; completing ongoing stakeholder engagement activities for various community groups, vendors, and customer types, and support for Grassroots Educator campaigns; and, updating these items to reflect statutory requirements, changes in law and changes as a result of the Agency's Long-Term Renewable Resources Procurement Plan;
- Managing the participation of more than 800 active Approved Vendors across both Programs, which includes processing requests to become a new Approved Vendor, reregistration of existing Approved Vendors, certification of Approved Vendors and other subcontractors as Equity Eligible Contractors, and active management and communication with active Approved Vendors (by example, during the 2024-25 Program Year, Illinois Shines had 724 active Approved Vendors, inclusive of 251 new participants);

¹⁷ Available at: <https://ipa.illinois.gov/content/dam/soi/en/web/ipa/documents/26-rfp-01-rfp-appendices.pdf>.

SECTION 2 - TECHNICAL PROPOSAL

- Processing at least 30,000 project applications during a program year (by example, during the 2024-25 Program Year Illinois Shines processed more than 28,000 applications and Illinois Solar for All processed 670 applications);
- Support initiatives within the programs to protect consumer interests, including management of a solar restitution program, an escrow process to protect payments intended to be passed through to consumers, and a program to incentivize Approved Vendors to assist customers that have been stranded by entities which have gone out of business or left the Illinois market. The selected Joint Program Administrator will be expected to work with the Agency's consumer protection team to administer, update and potentially expand consumer initiatives in the future;
- Assist the Agency in managing Approved Vendor and Designee compliance with the Equity Accountability System and ensure that participating entities meet the Minimum Equity Standards and workforce training initiatives as required under Illinois law;
- Ensure that projects developed through both programs meet applicable labor requirements prior to approval, including prevailing wage requirements and newly enacted requirements to ensure project labor agreements are in place for certain projects under P.A. 104-0458 starting June 1, 2026;
- Actively and continuously monitoring the Programs to identify and solve operational and/or process challenges, resolve Approved Vendor and/or customer issues, identify and achieve opportunities to improve the operation of the Programs, identify and communicate to the Agency opportunities to expand the reach of the Programs to support customers and expand renewable project development, and identify efficiencies to reduce program costs; and,
- The ability to support new and emerging Agency initiatives, either resulting from new or expanded legislation directing Agency action, changes in Illinois policy, or Agency-driven initiatives (for example, changes under P.A. 104-0458, the Clean and Reliable Grid Affordability Act, which contains provisions to update program requirements, develop a Geothermal Program, and develop a Storage for All Program in future program years).

2.3. Milestones and Deliverables: The successful Offeror will be able to assist the Agency to meet the following expected milestones and deliverables:

- 2.3.1. Transition:** Includes but is not limited to the development of a detailed project management process and schedule; shadowing of current Program Administrators; review of existing documentation and processes; stand-up and/or take-over of systems and tools; transfer and translation of Program data and information into the Joint Program Administrator's systems; updates to internal and external documents, standard operation procedures, guidebooks and manuals, and related information; take-over and continuation of REC delivery tracking and incentive invoicing; assuming leadership of consumer protection activities; continuing implementation and ongoing support of the Illinois Shines Mentorship Program; assuming support of ILSFA Grassroots Education activities, LIHEAP agency referrals through the NCSP+ Connector, the ILSFA Environmental Justice Self-Designation Committee, and leading the ILSFA Advisory Committee; facilitating equity eligible contractor certification

SECTION 2 - TECHNICAL PROPOSAL

activities; and helping to facilitate the enforcement of Minimum Equity Standard requirements by Approved Vendors.

- 2.3.1.1. Preliminary transitional activities, including initial process shadowing, schedule development, and project management activities, shall occur at least from the date of contract execution between the IPA and awarded Offeror through August 31 (further schedule refinements may be agreed upon between Agency and Offeror, informed by the Offeror's proposed transition plan).
 - 2.3.1.2. All transitional activities to occur by no later than June 30, 2027. This is inclusive of the development of all systems and tools, processes and procedures, updates to documents (both internal and those used by Approved Vendors, Designees, customers, or other external stakeholders), and assumed full responsibility as the Joint Program Administrator for both Illinois Shines and Illinois Solar for All.
 - 2.3.1.3. The Agency has provided a proposed schedule in Appendix 9 to provide all Offerors with details surrounding operational responsibilities, systems, and related tasks to support an effective transition from the current Program Administrators to the awarded Offeror of this RFP. The order and orientation of tasks defined in Appendix 9 may evolve or otherwise be adjusted based upon the recommendations of the awarded Offeror. At a minimum, any Offeror submitting a proposal to this RFP must develop a schedule, implementation plan, and associated costs in alignment with the Agency proposed schedule in Appendix 9; however, Offerors may also propose an alternative schedule and orientation of activities, including changes in cost. Any such alternative transition proposals must be accompanied with an explanation supporting the change in approach to enable the Agency to appropriately understand the reasoning and evaluate the changes. The Agency has also provided a detailed overview of ILSFA Administration Tasks (Appendix 7) and Illinois Shines Administrative Tasks (Appendix 8) which can also be reference to inform schedule development and broader proposal development.
- 2.3.2. Awarded Offeror will assume full responsibility of both Programs to commence the 2027-28 Program Year in addition to the expectation that core transitional activities will be stood up by June 30, 2027. The Offeror shall ensure that the portal is fully operational and able to accept ILSFA and Illinois Shines applications by January 1, 2027. The Agency intends to transition ILSFA first, with the Program Administrator assuming responsibility of ILSFA administration by January 2027; however, the Agency is open to alternative timelines as long as the transition of both programs is complete by June 30, 2027. This means the awarded Offeror will be responsible for the full operation and management of both Programs to begin the 2027-28 Program Year, with no support or expected transitional activities from current Program Administrators.
- 2.3.2.1. While it may be possible that agreements between the Agency and current Program Administrators remain in effect beyond June 2027, Offerors should not develop a proposal with this expectation.

SECTION 2 - TECHNICAL PROPOSAL

- 2.4. Proposed Staff:** The Offeror must have adequate staff with the necessary skill and experience to perform the requirements of this Solicitation. Using Table 2.4 below, please provide a list of all staff members, including subcontractors (if any), who will be assigned to support the Agency pursuant to this Solicitation and please provide details on what scope of work the staff members and subcontractor(s) will be assigned. Please insert additional rows as necessary. In addition to providing a list of all staff members, please attach the resumes of key staff to the Proposal. Note that billing rates by individual and title shall remain unchanged for the initial term of the contract (i.e. year 1 and 2 of a potential 5-year contract term, subject to annual extensions) to be awarded unless provided to and approved by the Agency. Any such changes shall be incorporated as an amendment to the contract.

Table 2.4 Proposed Staff

Staff/Subcontractor Name	Title	Proposed Role for this Solicitation	Relevant Area of Expertise	Proposed Billing Rate (\$/Hr.)	Expected Time to be Spent on Program (Full time, Part time)
<i>First Name, Last Name</i>	<i>Project Manager 1</i>	<i>Project Manager of Team A</i>	<i>Certified in ABC project management style</i>	<i>\$0.00</i>	<i>Part time, 25% allocation</i>

- 2.5. Where Services are to be Performed:** All services shall be performed in the United States. If the Offeror performs the services procured hereunder in another country in violation of this provision, such action may be deemed by the Agency as a breach of the contract by Offeror. In the case of a staff member, a contractor or subcontractor whose normal base of operations is in the United States but is temporarily outside the United States by virtue of personal travel or due to the performance of work for another client, and who while outside the United States under these circumstances also performs work for the Agency, no breach shall be deemed.

Please include a description of the locations where services will be performed, including an estimate of what portion of the work will be conducted in Illinois.

- 2.6. Offeror Proposed Solutions to Meet the Agency's Requirements:** Please provide responses to the following questions.

Responses should be included in a separate document and must be organized reflective of the format of the questions provided to allow the Agency to directly align each question to the associated Offeror response. This also enables the Agency to appropriately score each question as described in the table in Section 1.15. Please be sure to answer each question completely including all sub-questions.

Additionally, the **Agency is establishing for this RFP a maximum length for the Proposed Solutions document at 200 pages**. Offerors may include as an attachment, resumes that will not count towards this page limit. Similarly, the Proposal Checklist, response to Section 2.7 on conflicts of interest, signature pages, Section 3, and required Attachments are not included in that limit.

SECTION 2 - TECHNICAL PROPOSAL

Question 1 – Offeror Experience

The Illinois Shines and Illinois Solar for All programs have grown significantly in their size, breadth, and complexity since launched in 2019. With this RFP, the Agency is seeking a Program Administrator who can continue to manage the current size and rigor of the programs, build on the programs' successes to continue to support their expansion, implement the key qualitative elements of the programs oriented around shaping how the Illinois solar economy develops beyond simply whether it develops, and continuously reposition the programs to prepare for ongoing, effective and efficient administration in the future.

The Agency endeavors to understand the Offeror's experience and capacity to provide the Agency with the necessary confidence in the Offeror's capabilities to ensure the Offeror's teams are well positioned to drive success in the Programs. The Agency is an actively engaged, hands-on, and at times demanding client, expecting high-quality and thoughtful work, a commitment to maintaining integrity and robust ethical standards, strong accountability and reporting, and driven to realize meaningful results for customers, participating vendors, and the communities these programs support. While subsequent questions seek more detailed information on the Offeror's specific approach or vision when managing programs, technical capabilities, and operational organization and fortitude, in this question (Question 1) the Agency seeks to understand why the Offeror is the best fit as the Joint Program Administrator and should be selected. This includes the Agency internalizing responses by Offerors to questions such as:

- What makes the Offeror excel as a Program Administrator both qualitatively and organizationally?
- What makes the Offeror stand out?
- Why would the Offeror be the right fit for working with the Illinois Power Agency?
- How would the Offeror strengthen the Agency's programs?

The Agency directs Offerors to refrain from simply submitting marketing materials or information that the Agency could glean from the Offeror's website. This question seeks to ascertain a deeper understanding of the Offeror's organization, cultural fit, and capabilities. The Agency also notes that Offerors have already been found qualified through responses to 26-RFQ-01 and thus the Agency is familiar with the content of those responses. With this in mind, Offerors should not simply repeat content submitted via the RFQ response.

The Agency directs each responding Offeror to describe the strengths and experiences of their organization, including addressing all of the sub-questions below when developing a response to this question:

- Experience of Offeror in administration of solar incentive programs for distributed generation and community solar projects, including programs that either specifically focus on income-eligible households or include a component of the program that focus on income-eligible households.
 - Please highlight cases where the Offeror has successfully addressed market or operational challenges, providing a clear example.
- Relevant experience of staff and subcontractors that will be assigned to the programs (as listed in Section 2.4).
 - Please include a discussion of both technical staff and program staff.
- How the Offeror attracts and retains key staff.
 - Please include a discussion of the Offeror's commitment and approach to ensuring a diverse, equitable, and inclusive workforce.
- The Offeror's familiarity with and participation in the Illinois energy market, familiarity with the legal framework that governs the ILSFA and Illinois Shines programs, and understanding of and/or engagement with the key stakeholders who influence the work of the programs.

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- Describe the Offeror's engagement approach and relationships building strategy beyond the direct engagements with program participants (e.g. approved vendors).
 - Please describe how the Offeror has built relationships with key stakeholders, conducted outreach to communities, and built collaborations that establish the Offeror as a trusted and reliable community partner and resource.
- Past experience working with the subcontractors (if any) included in this proposal.
 - Please describe both (1) existing relationships with subcontractors included in the proposal, as well as (2) new relationships with subcontractors the Offeror has not yet worked with included in the proposal and the relevance each brings to the overall proposal.

Question 2 - Program Administration and Management

The combined administration of two solar incentive programs with multiple categories and sub-programs is complex, requiring exemplary project administration and management to be successful. The Agency must understand, in detail, how the Offeror will run the programs if awarded this Joint Program Administration contract. This includes ensuring Offerors provide: continuous and transparent communications with the Agency; proactive issue management, including providing recommended solutions to resolve issues; and, ongoing focus and action toward performance improvement.

Describe the following: (1) highlights of the Offeror's experience with overall administration and management of complex solar incentive programs, and (2) the associated vision for how the Offeror would manage the joint administration of Illinois Shines and Illinois Solar for All programs. Include, in detailed, responses to each of the following topics:

- Offeror's overall project management approach and how that approach adjusts to accommodate technical, administrative, and/or outreach and communication activities.
- Offeror's approach to the development, management, and monitoring of operational budgets.
- How the Offeror will develop and maintain program status reports for the Agency.
- How the Offeror proposes to communicate and keep the IPA informed of ongoing program activities, including issue identification and escalations.
- How the Offeror develops and maintains Standard Operating Procedures, including how they are utilized in staff training and ongoing staff development.
- How the Offeror develops, implements, monitors, reports on, and learns from Key Performance Indicators.
- How the Offeror utilizes information and feedback loops for long-term strategic planning and improvement.
- How the Offeror monitors and then adapts to changing market conditions and new legislative mandates.
- How the Offeror will ensure that program participants, project customers, and other interested parties have clear paths of communication to the applicable programs, including, but not limited to the proposed approach to providing call center and email response systems and services.
- How the Offeror will manage information and data, including sensitive and/or confidential materials .
- Offeror's legal review and management of Freedom of Information Act requests, and protocols and staffing for other data requests from outside parties and independent program evaluators.

SECTION 2 - TECHNICAL PROPOSAL

- Offeror's experience and approach to evaluating and developing action and implementation plans to accommodate legislative changes to a program's mechanics, which may include definitional and operational changes, expansion and/or enhancements to equity and accessibility and labor standards, and expansions to program offerings or the creating of new programs that compliment or buttress existing programs (e.g., the recently passed Clean and Reliability Grid Affordability Act or CRGA creates a Geothermal Homes and Businesses Program and the prospect of a Storage for All Program, both of which would be stood up in future years).
- Offeror's experience in program administration beyond solar incentive programs, which may include battery storage incentive programs, geothermal programs, and/or demand response and energy efficiency programs.

Question 3 – Information Technology Solutions

The successful administration of the Illinois Shines and Illinois Solar for All programs will require a robust, comprehensive, connected, and secure set of information technology solutions. While the two programs are currently administered using different software platforms by separate Program Administrators, a primary goal of this Joint Program Administration RFP is to facilitate an integration of systems. Through a combined platform and supporting system set, the Agency is pursuing a more unified experience for program participants, to improve efficiency in application processing, and to improve the way the Agency collects, stores, processes, and analyzes Program data. Further, the combined platform should improve the efficiency of system updates, leading to a streamlined process. While there may be some technical aspects of each program that require continued separation, for example the management and update of public facing websites (e.g., illinoisshines.com and illinoisfa.com), the Agency expects that program portals and all underlying systems, databases, and tools will be stood up and fully functional by March 1, 2027, with the Illinois Shines components of the portal stood up by January 1, 2027.

- Please describe in detail the information technology solutions the Offeror proposes to utilize to administer the programs:
 - Program Portal¹⁸
 - Please provide a detailed description of the proposed solution, including if it is currently in use in the administration of other programs, or if it will be specifically developed for the administration of the IPA's programs.
 - Please provide examples of relevant software development, describing how Offeror prioritized new features, user interface design, testing (including quality control and issues resolution), and accessibility.

¹⁸ The portal is the secure website used by program participants to submit end to end information into the program, including, but not limited to registration information for Approved Vendors and Designees, project applications, application fees, disclosure forms, contract documents and schedules, community solar subscriber management, and ILSFA income and eligibility verification information. The portal should have the ability to perform calculations for each application utilizing the input project data to determine the capacity factor and estimated RECs to be generated for the length of the contract. The portal should include the capability for Approved Vendors to pay application fees. The review and approval of applications and other information should also be managed within the portal. The portal should also include the abilities for program participants to utilize APIs and bulk uploads for the transfer of information to the program.

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- Please provide any relevant descriptions or examples on system design with the intended purpose of providing for the scalability of the system to accommodate future needs. (e.g., higher program volumes, new features or forms, new program categories and requirements, and/or new programs)
 - Data management
 - Please describe the underlying proposed database solution technology, including how data will be stored and data dictionaries developed and maintained.
 - Please describe how data will be migrated from existing systems to systems the Offeror will utilize to administer the programs, including maintaining data integrity and access throughout the migration process and post-migration auditing to ensure the migration was comprehensive.
 - Please describe how data is segmented or otherwise separated in the proposed database solution technology to provide for differences between programs and/or manage confidential information.
 - Customer Relationship Management
 - Please describe the proposed programs and systems to be used for facilitating participant ILSFA referrals from partnerships with LIHEAP agencies and participant communications including generating, logging, and tracking inbound and outbound calls and emails.
 - Please describe the proposed solution the Offeror will utilize for dynamic document generation that populates custom templates for single or multi-page PDFs, to produce program contracting documents, program invoices, and customer forms for wet or electronic signature.
 - Grassroots Education data tracking
 - Please describe how the Offeror will collect and track data related to the work of ILSFA Grassroots Educator data, including but not limited to campaign budgets, tracking of accomplished scope of work, collection of Grassroots Educator event participant contact information, logging and tracking of participant follow up, and tracking a participant from event attendance to an eventual ILSFA project.
- It is currently a standard of the IPA, as prescribed by the State, that generative Artificial Intelligence (AI) systems or software are not permitted to be used for performance of operational responsibilities and state mandated work. The Agency understands that AI legal frameworks/policies will be evolving for the foreseeable future, and with the rapid expansion and prevalence of AI systems into multiple systems, please describe both how any use of AI systems have been specifically segmented from any specific clients to create a comprehensive segregation of data and information from AI systems when required. If your firm does not currently use AI systems in your work, please explain how your firm would the approach segmenting IPA data to create a comprehensive segregation as new technology emerges. The eventual selected Offeror must comply with data privacy, copyright, Freedom of Information Act laws and any applicable State of Illinois policies on the use of AI.
 - Please provide clear examples, particularly as it relates to ensuring program data is compliant with data privacy, copyright, Freedom of Information of Information Act laws, as well as preserves privilege under governing legal frameworks.

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- The awarded Offeror to this RFP must comply with any applicable State of Illinois policies on the use of AI.
- Please describe the Offeror's technology development and implementation approach for new functions and features.
 - What is the Offeror's method to develop road maps to facilitate a system or tools developmental cycle?
 - Is there a standard approach used when developing a custom application or system for a targeted function?
- Please describe in detail the platforms the Offeror proposes to utilize to manage program websites, www.illinoisshines.com and www.illinoissfa.com.
- Please describe how the Offeror manages and responds to cybersecurity threats and risks.
 - Describe your cyber security governance model.
 - Describe how the team responsible for cyber security management is structured, including how it is defined within your overall IT team and if any sub-contractors are used and how.
- Describe your threat management lifecycle, including monitoring approach, threat identification/prioritization/escalation, communication with clients and affected parties, and resolution. Please describe the Offeror's certifications of technology solutions, including, but not limited to SOC 2 reporting.
 - How many years has your organizations SOC 2 reporting been completed?
 - Please document who your external auditor has been and if it has changed over time.
 - Describe any finding or assessments made and a brief explanation of resolution related to any major findings.
- What service levels does the Offeror utilize for maintaining program portals and websites?
 - Describe any identified conditions where a unique service level standard should be established either for program portals, websites, or other systems/applications.
- Please include a description of the long-term management of the systems described above after the expiration of the contract term pursuant to this RFP. How will the Program Administrator ensure ongoing Agency access to portal and other software data and functionality after the term of the contract should the Agency move to a new Program Administrator?

In developing the Offeror's proposed information technology solutions, the Agency has provided the information below which describes the scope and scale of historical program information. This detail is intended to provide Offerors with reasonable, current approximations of program operational statistics.

- Current platforms
 - Illinois Shines
 - Program portal: developed in Mendix
 - Customer relationship management: Salesforce
 - Application fee processing: Stripe
 - Generation of disclosure forms: Customized solution through Program portal
 - E-signing of disclosure forms: Dropbox Sign
 - illinoisshines.com site hosting: WP Engine Wordpress
 - Illinois Solar for All
 - Project applications and customer relationship management: Salesforce

SECTION 2 - TECHNICAL PROPOSAL

- Generation of disclosure forms: Salesforce
- E-signing of disclosure forms: Adobe Acrobat Sign
- Illinoisfa.com site hosting: WPEngine Wordpress
- Project Applications
 - Historic: Over 100,000 project applications approved (from 2019 to December 2025)
 - Illinois Shines 2024-25 Program Year: 21,900 applications
 - Illinois Solar for All 2024-25 Program Year: 820 applications¹⁹
 - Estimated 30,000 new applications per year across both programs
 - Project Applications include a Part I initial application and a Part II application after projects are energized. Each part includes over 90 data fields and required document uploads
- Batches
 - 1,101 batches submitted to the Program for Part I application submissions in 2024-25 Program Year for Illinois Shines
 - All projects must be placed into batches
 - Illinois Shines batches also require the processing of application fees
- Contracts
 - 263 contracts, including 876 batches, generated and processed for ICC approval in 2024-25 Program Year for Illinois Shines
 - Batches of approved projects are placed onto a contract with one of the utilities (and for ILSFA some contracts are with the IPA)
- Approved Vendors
 - 724 participating Approved Vendors at the end of 2024-25 Program Year for Illinois Shines including 111 Equity Eligible Contractor certified Approved Vendors (Including Single Project Approved Vendors)
- Designees
 - 727 participating Designees at the end of 2024-25 Program Year for Illinois Shines including 28 Equity Eligible Contractor certified Designees
- Subcontractors
 - 19 Equity Eligible Contractor certified Subcontractor at the end of 2024-25 Program Year for Illinois Shines
- Disclosure Forms - Each Distributed Generation project application and Community Solar subscriber require a signed Disclosure Form to participate in the Program.
 - 180,000 Disclosure Forms submitted in 2024-25 Program Year for Illinois Shines
- REC incentive payments
 - \$428,265,688 REC incentive payments Invoice generated in 2024-25 Program Year for Illinois Shines

¹⁹ It's notable that the increased ILSFA Residential Solar (Small) demand among a growing number of Approved Vendors that was initially seen in the 2024-25 Program Year continued in the current 2025-26 Program Year, quickly exhausting available in both the initial PY2025-26 sub-program allocation in June and additional \$8 million released from the reopening of the 2024 Long-Term Plan in November. As of the closing of the rolling submissions in November 2025, over 1,300 Residential Solar (Small) projects have been received, with additional activity expected in the Spring of 2026 when any remaining Residential Solar (Large) allocations will be made available for both Residential sub-programs.

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- REC deliveries
 - 2,051,471 RECs delivered in 2024-25 Program Year for Illinois Shines

Details on data structure, programing, and technology roadmaps will be provided after contract execution and utilized in the development of a more detailed program transition plan.

Question 4 – Application Processing and Ongoing Project Management

The Program Administrator is responsible for the processing of project applications from initial submission of a Part I application through Part II verification which includes invoicing. The application review processes for the IPA's solar incentive programs are different from those utilized in solar programs in other jurisdictions; please review Appendix 5 and Appendix 6 for more detail on the application review processes for ILSFA and Illinois Shines, respectively. Additionally, all application requirements for Illinois Shines and ILSFA can be found in the Program Guidebook and Approved Vendor Manual, respectively.

After projects are Part II verified (thus marking the end of the application review and verification process), the Program Administrator is responsible for tracking project compliance throughout the term of the REC Contract. Core duties related to this compliance include performing project inspections, tracking REC deliveries from projects, completing annual reporting requirements, performing collateral drawdowns related to REC under deliveries, evaluating and processing project assignments and removals, and more.

Additionally, while administering the programs the Program Administrator is often tasked with ongoing communication and coordination activities with Illinois electric utilities who serve the customers participating in the program, and in whose territories program projects are interconnected.²⁰ Such interactions include but are not limited to the administration of contracts and related documents, resolution of contract issues, resolution of customer and/or approved vendor inquiries and challenges, facilitation of consumer protections, solicitation of feedback and information on program management, and related topics.

First, describe (1) the Offeror's experience relevant to application processing for programs at the scale previously described and (2) the associated vision for an improved experience in application processing and the post-Part II verification activities for participants across both programs, including but not limited to:

- Staffing
 - Technical staffing to support the review of project specifications and occasionally necessary engineering reviews of projects
 - Staffing to support capacity for application review and processing
 - Staffing to support post-Part II verification work
- Describe your approach and capability to ramp-up project application processing rates during high volume submission periods²¹
 - Detail internal staff reallocation measures and/or utilization of sub-contractors

²⁰ These electric utilities include Commonwealth Edison (ComEd), Ameren Illinois, and MidAmerican Energy.

²¹ High volume submission periods could be between 1,000-2,000 applications submitted per week across both programs.

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- Approach to updating and maintaining a project application portal that supports application submissions and calculates REC delivery estimates
- Approach to securely collecting and tracking application fees (Illinois Shines only)
- Approach to maintaining of a database of income eligible program participants. This would include the ability to securely accept, manage, and review Personally Identifiable Information associated with verifying income eligibility that may be submitted by an Approved Vendor/Designee or from the participant themselves.
- Describe your approach to managing relationships with Approved Vendors who have non-compliant applications to support getting the Approved Vendor applications in compliance.
 - Describe the communication strategy
 - Describe processes, training, protocols or other measures implemented
- Describe your approach to managing the REC Contracting process, which is inclusive of the following elements: a batch of projects, associated REC prices (and any relevant REC adders), and schedule of expected REC deliveries which includes quality assurance protocols to ensure that the correct financial incentives are assigned to projects and contracts. Responses should consider quality assurance/quality control, document development, data management, and approved vendor communication and coordination.
- Ability to perform qualitative and quantitative review of project applications for program categories where a project selection process is necessary, including community solar project application scoring for Illinois Shines projects²² and the implementation of project scoring and selection protocols for Illinois Solar for All²³
- Describe your approach to facilitating program management activities in coordination with utilities or similar parties in a capacity where your interactions were not as a consultant for the utility. This should include managing ongoing contracting and/or document execution, issue resolution, and requests for feedback to improve program operations and implement new initiatives.

Second, describe (1) the Offeror's experience relevant to managing ongoing compliance activities during the term of a REC contract²⁴ and (2) the associated vision for an improved experience for program participants across both programs, with topics and responsibilities that include but are not limited to:

- On-site and desktop project inspections
- Development of invoicing statements after Part II verification of projects
- Quarterly and annual review of community solar subscription levels and commitments

²² More information on community solar scoring processes for TCS and CDCS projects can be found in Appendices E and F of the Illinois Shines Program Guidebook: <https://illinoisshines.com/wp-content/uploads/2025/06/Illinois-Shines-2025-26-Program-Guidebook-Final-18-April-2025-3June2025-correction-for-publication.pdf>

²³ See <https://www.illinoisfsa.com/wp-content/uploads/2025/02/2025-2026-Project-Selection-Protocol.pdf> for the current protocol for ILSFA.

²⁴ REC Contracts for ILSFA can be found here: <https://www.illinoisfsa.com/resource-library/>; REC Contracts for Illinois Shines can be found here: <https://illinoisshines.com/program-documents/#rec-contracts>

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- Tracking actual REC deliveries relative to the expected REC delivery quantities under contract and the review of Approved Vendor Annual Reports. This will also include the calculation of collateral drawdowns when REC deliveries are under expected amounts.²⁵
- Ability to track qualitative and quantitative project commitments throughout the life of the REC delivery contract for program categories where a project selection process (and thus these attributes are present) is necessary.

A comprehensive response to Question 4 must include information related to both application processing *and* ongoing project management.

Question 5 – Participant and Customer Support

The IPA solar incentive programs provide value to participating customers who can: engage with Approved Vendors and Designees vetted by the programs; take advantage of educational materials, resources, and consumer protection support; receive financial incentives that may be passed on by participating vendors; stay up-to-date on program evolutions and updates, and more. The Program Administrator is responsible for providing support to both participating companies – Approved Vendors, Designees, Equity Eligible Contractors²⁶, Subcontractors. Small and Emerging Businesses^{27,28} – *and* the customers that those participating entities serve. Understanding current practices, processes, and participant and customer touchpoints is important as to not lose ground on program successes or have the programs grow state and non-response; however, equally important is how the Program Administrator maintains momentum by ensuring support needs of participants and customers remains at the forefront program develop and evolution. For this reason, it is critical that the Program Administrator develop processes, practices, and protocols to continuously evaluate participant needs, vet those finding in relation to program and policy needs and expectations with the Agency and stakeholders, and develop solutions that meet evolving participant and customer demands.

Describe (1) the Offeror’s experience relevant to participant and customer support as outlined below, and (2) the associated vision and approach the Offeror proposes to implement for an improved experience for program participants across both programs, including but not limited to:

Participant Support

- Engaging with participants to identify: (1) issues and the causal factors impacting and/or creating identified issues, (2) identifying activities or processes working well that should be reinforced, and (3) opportunities for improvements in process, efficiency, expediency of processing data/information/forms/etc.

²⁵ See: <https://illinoisshines.com/wp-content/uploads/2025/05/AV-Annual-Report-Guide-v250528.pdf> for the 2024-2025 Annual Report guide for Approved Vendors.

²⁶ Additional information on the different types of EECs here: <https://illinoisshines.com/become-an-equity-eligible-contractor-eeec-approved-vendor-or-designee/>

²⁷ See Section 1-56(b)(2) of the IPA Act

²⁸ The 2024-2025 Small and Emerging Business Annual Report can be found here: <https://www.illinoisfa.com/wp-content/uploads/2025/08/2024-2025-Small-and-Emerging-Business-Annual-Report.pdf>.

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- Evaluating, vetting, implementing and refining key participant touchpoints. This includes but is not limited to participant-specific application and renewal process impacts and needs, touchpoints with EECs who only participate through the IL Shines Program, and participants that have unique engagement needs such as SEBs.
- Coordination and communication approaches with participants that facilitates continued participant engagement, supports participant compliance and related reporting responsibilities, providing education sessions, providing Program Administrator and Agency engagement forums (e.g., webinars, workshops, office hours, etc.), and ensuring participants remain informed about program happenings, updates and so on.
- Offeror's experience and recommendations specifically supporting SEBs. The IPA Act directs the Agency to "make every effort to ensure that small and emerging businesses, particularly those located in low-income and environmental justice communities, are able to participate in the Illinois Solar for All Program."²⁹
- Experience implementing and improving initiatives like the IL Shines Mentorship Program³⁰, focused on advancing DEI objectives by providing mentees with training covering IL Shines processes and requirements while also facilitating networking and support across participating stakeholders.
- Offeror approach to providing unique and/or individual (one-on-one) support to Approved Vendors.

Customer Support

- Engagement to understand customer key touchpoints, areas of confusion or misunderstanding that requires improved clarity, ideal approaches (tools/platforms, communication styles, etc.) to provide timely and usable information and/or education, identify issues and collaborate on solutions, and provide feedback and updates on actions taken following customer provided input.
- Evaluating the program referral processes to identify areas of improvements while maintaining the necessary standards implemented through the process (e.g., ensuring a neutral referral process, providing clear information on the program and requirements/terms to customers, etc.)³¹
- Experience and recommendations for providing customers with necessary program information and educational opportunities
- Providing customers with ongoing information on project progression and status updates (e.g., Income Verification Approval Letters, notifications or process updates, etc.).

A comprehensive response to Question 5 must include information related to both participant and customer support.

²⁹ 20 ILCS 3855/1-56(b)(2).

³⁰ More information on the Illinois Shines Mentorship Program can be found here:

<https://illinoisshines.com/mentorship-program/>

³¹ See the following references for examples of currently implemented educational materials and processes – ILSFA

Consumer Resources: <https://www.illinoisfsa.com/consumer-education-resources/> ; Illinois Shines Disclosure Form

resources: <https://illinoisshines.com/disclosure-forms/>; Illinois Shines Consumer Resources:

<https://illinoisshines.com/brochures-and-other-resources/>

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Question 6 – Implementing Consumer Protections

Since the commencement of the Illinois Shines and Illinois Solar for All programs, the Agency has considered safeguards for consumers participating in the programs to be vitally important, underpinning the success of both programs. The ability to ensure customers receive clear and accurate information about the programs and any solar offers they receive is critical to empowering customers to make prudent and educated decisions regarding going solar. The Program Administrator is responsible for developing proactive consumer protection requirements and initiatives, observing the market for noncompliant behavior, and enforcing consumer protection requirements, which sometimes results in the suspension of participants from IPA solar incentive programs. The Program Administrator is also responsible for ensuring clear and communicative information and guidance is provided to customers considering participation in the program and after participation begins.

Describe (1) the Offeror's experience relevant to implementing proactive *and* reactive consumer protections, and (2) the associated vision for an improved experience for program participants across both programs, including but not limited to:

- Updating and publishing the Consumer Protection Handbook in coordination with the IPA's Consumer Protection Team on an annual basis.³²
- Conducting customer education initiatives and communications which could include education sessions or workshops, developing an approachable and informative website design, or providing informational updates through different platforms such as social media or email.
- Intake, investigation, and resolution of consumer complaints and potential related consumer protection violations (1,000+/year).³³
- Making disciplinary determinations and drafting formal disciplinary communications, including comprehensive research into the challenges to inform the determinations and responses, such as warning letters and suspension letters, supported by experienced legal staff (500+/year).
- Developing and implementing new consumer protection requirements and initiatives responsive to consumer protection issues.
- Consumer protection-focused review of Approved Vendor and Designee applications/renewals, including the tracking of ownership and affiliations between Approved Vendors and Designees.³⁴
- Implementing existing Consumer Protections Initiatives: Solar Restitution Program, Escrow Process, REC Adder for Stranded Customers.³⁵
- Support of "stranded customers," or customers whose Approved Vendor and/or Designee has gone out of business.³⁶

³² Current version of the Consumer Protection Handbook here: <https://illinoisshines.com/wp-content/uploads/2025/04/CP-Handbook-Final-Clean.pdf>

³³ In the 2024-25 Program Year Illinois Shines received and processed 1,014 complaints and ILSFA received and processed 9 complaints.

³⁴ Ownership and affiliations must be tracked in order to both properly implement consumer protection work as well as the Illinois Shines program's various developer caps.

³⁵ More information on Consumer Protection initiatives here: <https://illinoisshines.com/consumer-protection-initiatives/>. All three initiatives have been launched in Illinois Shines, but Solar Restitution Program and REC Adder are also relevant for ILSFA and have not yet been launched for ILSFA.

³⁶ More information on stranded customer support here: <https://illinoisshines.com/stranded-customer-resources/>

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- Review and assessment of Grassroots Educator and Approved Vendor/Designee materials for compliance with consumer protection requirements including: Disclosure Forms, Approved Vendor-customer contracts, marketing materials, and Designee management plans.
- Leading the Consumer Protection Working Group, which 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.³⁷
- Preparing Annual Complaints Report for filing with the Illinois Commerce Commission.³⁸

A comprehensive response to Question 6 must include information related to maintaining current consumer protection work, as well as how the Offeror would approach new, proactive consumer protection work.

Question 7 – Implementing Labor and Equity Provisions

The Program Administrator is responsible for the implementation of several labor and equity provisions applicable to both IPA solar incentive programs. In 2021, CEJA amended the Illinois Power Agency Act to expand the “priority access to the clean energy economy for businesses and workers from communities that have been excluded from economic opportunities in the energy sector, have been subject to disproportionate levels of pollution, and have disproportionately experienced negative public health outcomes.” CEJA directs the IPA to help historically underserved communities participate in and benefit from the growing clean energy economy in Illinois. This focus on equity and labor work is core to both ILSFA and Illinois Shines programs, and includes many different workstreams including a requirement for a minimum requirement of Equity Eligible Persons on staff for each company participating in the programs, payment of prevailing wage to individuals constructing projects participating in the programs, and more.

Describe (1) the Offeror’s experience relevant to implementing labor and equity provisions as outlined here, and (2) the associated vision for an improved experience for program participants across both programs, including but not limited to:

- Supporting the IPA in the facilitation of the Equity Accountability System³⁹ including supporting the increase of Equity Eligible Persons (EEPs) and Equity Eligible Contractors (EECs).
 - Implementation and compliance with the Minimum Equity Standard, increasing steadily year-over-year and includes three compliance submissions by program participants annually.^{40, 41}
 - Certification of EEPs through the Minimum Equity Standard compliance reporting requirements.
 - Management of EEC category in Illinois Shines, including growth of this program category over time.

³⁷ More information on the Consumer Protection Working Group here: <https://illinoisshines.com/consumer-protection-working-group/>

³⁸ View all Annual Complaints Reports here: <https://illinoisshines.com/annual-complaints-reports/>

³⁹ An overview of the Equity Accountability System can be found here: <https://illinoisshines.com/equity-accountability-system-hub/>

⁴⁰ More information on the MES can be found here: <https://illinoisshines.com/minimum-equity-standard/>

⁴¹ Currently, the Minimum Equity Standard is limited to the Illinois Shines program, but it will become a compliance alternative to the job training requirements for ILSFA Approved Vendors beginning in the Program Year commencing on June 1, 2026 per the Clean and Reliable Grid Affordability Act (CRGA).

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- ILSFA requirement for utilization of job training graduates at both the project and portfolios leaves and general coordination with job training programs to ensure these goals are manageable for ILSFA Approved Vendors.⁴²
- Review and approval of project labor agreements for large community solar projects.⁴³
- Review projects for compliance with prevailing wage requirements through the collection and assessment of Certified Transcripts of Payroll.
- Perform equity related outreach specifically related to:
 - **Grassroots Educator program** – Coordinate Grassroots Education efforts by performing a Request for Proposals for Grassroots Educator campaigns, providing robust promotion across Illinois to engage local non-profit service providers in underserved communities. This will include, but is not limited to, preparing the Request for Proposals, drafting Grassroots Educator contracts, facilitating onboarding, training selected organizations, supporting development of strategies to achieve the campaign goals, and meeting regularly with the selected Grassroots Educators.⁴⁴
 - **Public Schools Category** – Illinois Shines has a project category specifically for projects located on/serving public schools. This category has experienced undersubscription so, the Program Administrator engages in outreach efforts to increase participation in this area of the Illinois Shines program.⁴⁵
 - **Equity Eligible Contractors (EECs)** – As the EEC category in the Illinois Shines program is meant to grow over time, the number of EECs must increase as well to ensure participation in the category. The Program Administrator is responsible for performing outreach to accomplish these goals of increasing the number of EECs participating in the Illinois Shines program.
 - **Environmental Justice Communities (EJCs)** – The IPA Act directs the Agency to provide special consideration to Environmental Justice Communities in implementing ILSFA. Through the Agency’s Long-Term Plan, ILSFA has a methodology to define environmental justice communities.⁴⁶ The Program Administrator will advise on refinement and implementation of the EJ methodology and developing interactive maps that identify the EJ status of a queried address. Additionally, the Program Administrator will conduct outreach in EJCs and underserved communities to encourage accessibility of ILSFA Approved Vendors, identify potential participants, and promote Grassroots Education campaigns focused in EJ and underserved communities.

⁴² See Sections 1-56(b)(2) and (5) of the IPA Act and Long-Term Plan and Sections 8.8.1, 8.9.1,

⁴³ This is a new workstream beginning in Program Year commencing June 1, 2026 per the Clean and Reliable Grid Affordability Act (CRGA).

⁴⁴ More information on ILSFA’s Grassroots Education work can be found in Section 8.15 of the Long-Term Plan and on the ILSFA website: <https://www.illinoissfa.com/grassroots-education/>

⁴⁵ More information on Public Schools outreach efforts here: <https://illinoisshines.com/wp-content/uploads/2025/09/Public-Schools-Outreach-Plan-v250926.pdf>

⁴⁶ See Section 8.12 of the 2024 Long-Term Plan:

<https://ipa.illinois.gov/content/dam/soi/en/web/ipa/documents/20251031-modified-2024-long-term-renewable-resources-procurement-plan-31-october-2025.pdf>

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- Processing, approval, and accounting of requests from EECs related to advance of capital.^{47,48}
- Developing and hosting up to two annual Equity Accountability System trainings to educate Approved Vendors and Designees on equitable workforce best practices in recruiting, hiring and retaining Equity-Eligible Persons (EEPs), and in developing relationships with Equity Eligible Contractors (EECs).

A comprehensive response to Question 7 must include information related to both equity *and* labor work.

Question 8 – Marketing, Communications, and Outreach

The Program Administrator is the primary originator of program information and updates that are timely, accessible, and accurate for program participants, customers, and broader stakeholder communities and organizations. Additionally, the Program Administrator is expected to be a liaison to program participants and stakeholders, leading efforts to engage these groups through various means (e.g., surveys, workshops, direction communications) in an effort to obtain and synthesize feedback that can translate to prospective program improvements. These improvements may be realized through a host of processes such as annual updates to key governing documents or adjustments to program processes and operations that may be affected through updates to the IPA's Long-Term Renewable Resources Procurement Plan.

Describe (1) the Offeror's relevant experience and (2) the associated vision for managing marketing, communications, and outreach to a major energy-related program and supporting robust stakeholder engagement for optimizing the experience for Approved Vendors and customers across both programs, including but not limited to:

Marketing and Communications

- Drafting and publishing program announcements to stakeholders, with messaging that optimizes comprehension and engagement of a wide audience.⁴⁹
- Developing and maintaining public facing program materials and communications to promote and inform program participants and customers of basic solar education and program requirements, benefits, and protections.⁵⁰
- Developing and running promotional campaigns, including specialized webpages and social media pages, for a public-facing solar incentive program.

⁴⁷ Information on Advance of Capital requests can be found in Section 7.4.6.1 of the Modified 2024 Long-Term Plan found at <https://ipa.illinois.gov/content/dam/soi/en/web/ipa/documents/20251031-modified-2024-long-term-renewable-resources-procurement-plan-31-october-2025.pdf>. More on Illinois Shines advance of capital requirements can be found here: <https://illinoisshines.com/wp-content/uploads/2023/12/Final-Advance-of-Capital-Evaluation-Criteria.pdf>

⁴⁸ Currently, the advance of capital provision is limited to the Illinois Shines program, but it will become available under ILSFA soon, per the Clean and Reliable Grid Affordability Act (CRGA).

⁴⁹ ILSFA released 101 announcements in the 2024-2025 Program Year. ILSFA Announcements can be found here: <https://www.illinoissfa.com/vendors/announcements/>

⁵⁰ In addition to the Core Materials identified for both programs in Appendices 3 and 4, other examples of program materials found in the ILSFA Resource Library (<https://www.illinoissfa.com/resource-library/>) and Consumer Education and Resources (<https://www.illinoissfa.com/consumer-education-resources/>) pages. Illinois Shines program materials can be found here: <https://illinoisshines.com/program-documents/>

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- Upholding relevant program branding throughout program materials, websites, and communications.
- Language translation and accessibility formatting for public-facing communications for a wide audience.

Outreach and Stakeholder Engagement

- Providing regular feedback opportunities in order to identify and develop program improvements through:
 - Annual Approved Vendor roundtables, Approved Vendor/Designee and Grassroots Educator office hours, monthly and ad hoc work groups, surveys, written stakeholder feedback requests on proposed program changes, workshops, etc.
- Outreach to communities throughout Illinois, with a focus on environmental justice communities and Equity Eligible Contractors, building working relationships with trusted community leaders to increase awareness and participation in the programs and engagement in stakeholder feedback processes.
- Building working relationships with energy efficiency programs and community action agencies to promote cross-referrals that maximize residential energy efficiency and solar installations.
- Organizing and facilitating the ILSFA Advisory Committee, seeking Committee members of diverse backgrounds and lead quarterly Committee meetings that encourages robust engagement to inform Program improvements.¹⁰
- Developing a process for media readiness and response including supporting inbound media or legislative inquiries and external pitches from the Agency.
- Supporting identification, outreach, and development of program case studies, success stories, and testimonials to positively promote program participation.

A comprehensive response to Question 8 must include an approach to crafting communications for a variety of stakeholder audiences (Approved Vendors/Designees, consumers, general public, etc.) with a variety of energy and solar knowledge. Further, the development of effective communication materials is predicated upon Program Administrator communications and marketing teams working closely with subject matter experts on their program teams. As such, an Offeror's response should also consider how the Program Administrator intends to ensure its communications development process produces communications that are accurate, accessible, and engaging to targeted stakeholders.

Question 9 - Transition Planning and Program Efficiencies

The smooth transition of program administration is a high priority for the Agency. While the Agency has proposed a phased-in approach over program year 2026-2027, continuity of the operations of Illinois Shines and Illinois Solar for All is also critical for the market. Every day, disclosure forms are generated, project applications submitted, inquiries made and responded to. These functions must continue without disruption during the transition of program administration.

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The selected Offeror is tasked with conducting a program discovery process,⁵¹ development and implementation of IT solutions, staff development/recruiting/training, and the development of new materials for program operation. Separate from the previous question (how the Offeror would administer the programs on an ongoing basis), in this question the Agency seeks to understand how the Offeror will ensure that the transition of programs will be implemented successfully.

Describe (1) the Offeror's relevant experience and (2) the associated vision for managing the transition of program administration, including but not limited to the following items.

- Past experience in assuming the administration of ongoing programs (as opposed to the development/launch of a new program).
 - What approaches and management tools has the Offeror successfully used to ensure success, and what are key lessons learned?
 - How has the Offeror balanced the redeployment of existing staff to the recruitment of new staff?
- What does the Offeror see as the largest risks in transitioning the administration of Illinois Shines and Illinois Solar for All, including the timeline described in Section 2.2 and Appendix 9.
- Does the Offeror have proposed modifications to the milestones set out in Section 2.2 and Appendix 9 that the Offeror believes would be a more efficient transition model, subject to the inflexible requirement that by June 1, 2027 the selected Offeror will be capable of successfully administering the day to day operations of both programs.

2.7. Conflict of Interests

The Agency is very concerned about conflicts of interest related to photovoltaic projects participating in either program where the Offeror (or its subcontractors) has been involved in the project's planning, development, or operation. Given the specialized nature of facilitating new renewable energy projects, the Agency recognizes that Offerors and/or subcontractors may currently or previously have engaged in work for entities that participate in the Agency's programs. The Agency believes that with proper disclosure and management, including screens and separation of teams and processes where necessary, relationships between the Program Administrator (and its subcontractors) and program participants for work on photovoltaic projects outside of the Illinois Shines and ILSFA All programs may be navigable.

Assuming the Agency believes that such conflicts can be effectively navigated, the Agency may consider proposals who have worked on projects that have or are potentially eligible to participate in either program subject to the following conditions:

- All current and past engagement with program participants by the Offeror and/or its subcontractors must be disclosed in the Offeror's proposal.

⁵¹ Program discovery serves to provide the Offeror with a detailed understanding of the Illinois Shines and Illinois Solar for All Programs to enable the Offeror to inform all facets of program design, development and implementation. This effort will provide nuance to enhance the information already mapped through this RFP, program documents (e.g., AV Manuals and Guidebooks) and other documentation.

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- Any project in which the Offeror and/or its subcontractors were involved in planning, development, and/or operation that is submitted to either program during the term of the REC contract must be flagged by the Program Administrator for further review and approval by Agency staff in order to ensure that normal project review, selection, and/or approval processes are followed and that such projects do not receive any type of preferential (or disadvantageous) treatment.
- Any project in which the Offeror and/or its subcontractors were involved in planning, development, and/or operation that is currently under a REC contract in either program must be flagged by the Program Administrator for further review and approval by Agency staff in order to ensure that any processes in managing the ongoing obligations under the REC contract are followed and that such projects do not receive any type of preferential (or disadvantageous) treatment.
- The selected Offeror and its subcontractors must commit to stop working on any projects that have pending application(s) in either program, may potentially be submitted to either program, or are under a REC contract in either program as of the effective date of the contract resulting from this RFP.

To ensure that the Agency has a full picture of any such conflicts:

1. Please provide a copy of the Offerors policy for screening for conflicts of interest and the policy for how the Offeror proposes to manage any identified conflicts of interest or new conflicts of interest should they arise.
2. Please provide a list of all photovoltaic distributed generation or community solar projects that the Offeror and its subcontractors have worked on in Illinois in the past five years, including the nature of the work conducted and the entity that contracted for the work. Indicate if the project is participating in or plans to participate in either program, and whether the work has been completed or is ongoing. For work that is ongoing, please indicate expected completion date.
3. Please provide a certification that the Offeror and its subcontractors will cease work prior to the start of the contract awarded pursuant to this RFP and will also not accept any new work related to projects that are participating or would participate in either program.

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2.8. References:

Please provide four (4) references in Attachment JJ.

SIGNATURE OF AUTHORIZED REPRESENTATIVE: The undersigned authorized representative of the identified Offeror hereby submits this Technical Proposal to perform in full compliance with this Solicitation.

Signature of Authorized Representative: _____

Printed Name of Signatory: _____ Date: _____

SECTION 3 – PRICING PROPOSAL

3. PRICING PROPOSAL

Offeror shall submit a Total Price Quote to implement the Offeror's proposed solutions to meeting the level of program activity described below in Section 3.1.

The Total Price Quote submitted as part of the Offeror's Proposal will be one factor used by the Agency to evaluate the Proposal (as specified in I.13), assist in selection of the winning Offeror, and will form the basis for negotiation of the final contract. Failure to submit a Total Price Quote (and supporting elements) in Section 3.3 and Appendix NN will render Offeror's entire Proposal non-responsive. The Agency will evaluate the reasonableness of the Price Components contained in Section 3.3 and Appendix NN as a portion of the scoring of elements of responsibility as specified in I.15.

Offeror's Total Price Quote, at the discretion of the Agency, may or may not serve as the basis for compensation terms of any resulting contract. The resulting contract may contain both fixed and variable components as listed in Section 3.3 (below) to account for actual levels of realized program activity, and will have a maximum, not-to-exceed contract value for each state Fiscal Year. While the Program Administrator will collect application fees received for project submissions by Approved Vendors through the Illinois Shines program and net those fees from services invoiced to the Agency, the Offeror's **Total Price Quote** should reflect the Offeror's total projected expenditures that does not account for any project application fees.

While the Total Price Quote may serve as the basis for the resulting contract, the Agency expects that the final budget (including treatment of application fees) for the selected Offeror will be negotiated after the award notice, prior to ICC approval of a contract for the initial term between the Offeror and the Agency. Due to the complexity and scope of the two programs, the Agency recognizes that any Offeror's proposal will require further collaboration with the Agency to develop a comprehensive, implementable transition plan that allows both programs to continue to operate while consolidating administration under one organization. The Agency expects the post-award negotiations will in turn will impact the resulting budget proposal by Offerors. For example, an Offeror may propose novel approaches to jointly manage the currently separate programs more efficiently that the Agency may not have the authority to implement, requiring adjustment to the budget proposal.

The Agency is currently assessing the impact of Public Act 104-0458, the Clean and Reliable Grid Affordability Act (CRGA), which will become effective on June 1, 2026. Given the recent passage of CRGA, the scope and timing of the Agency's obligations resulting from the Act have not yet been fully mapped, which will in turn impact the cost of operating the programs. The Agency expects that the final budget will include additional negotiated line items for ad hoc services and contingencies.

In evaluating pricing proposals, the Agency is focused the reasonableness of the pricing component of the overall proposal in relation to the approach recommended by the Offeror. The Agency will score the pricing proposal based on an assessment of that reasonableness. This includes, but is not limited to, hourly rates, the allocation of work to staff in varying cost tiers, estimates for the cost of developing and implementing technology solutions, costs associated with the utilization of full-time employees versus temporary positions to support targeted support needs and/or program transition, and proposed unit pricing for project application reviews. Offeror pricing proposals should be comprehensive and detailed enough to enable the Agency to appropriately assess the responsiveness and reasonableness of the proposal. While the final award to the selected Offeror will provide an opportunity for collaboration and finalization of the work plan in its entirety (including costs), it is critical that Offerors provide a complete, detailed, and supported pricing proposal for the Agency to evaluate as an element of this RFP for scoring and selection.

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Please note that the Total Price Quote and associated budget support should be for the administration of the program only and should not include any payments made to Approved Vendors for RECs.

3.1. STUCTURE OF PRICING PROPOSAL

For the purpose of the Pricing Proposal, the Agency is requesting Offeror submit a pricing proposal that contains budgets for two phases, recognizing that the phases may overlap and be structured differently for different Offerors. **Phase One** is the transition of program administration from the incumbent Program Administrator(s) to the selected Offeror, and **Phase Two** is the Offeror assuming full and complete administration of the programs.

For Phase One, the Offeror is instructed to propose a budget that will encompass the complete suite of activities necessary to develop the knowledge, technology infrastructure, staff, and procedures to fully understand and successfully administer the programs. The Agency recommends that the Phase One budget should be structured in five primary categories:

1. Process, procedures, and requirements discovery
2. Technology design and development
3. Staff development/recruiting/training
4. Materials development
5. Project management, schedule, and work prioritization

Offerors may further delineate additional steps or sub-parts as necessary. Additional information below will provide guidance on what to include in each category.

The Phase One budget will cover the period from the start of the contract (expected to be on or around June 1, 2026) through May 31, 2027, at the latest. The Phase One and Phase Two budgets may overlap, for example, as a Program Administrator takes on full operational control of one of the programs (and thus shifts to Phase Two budget), the other program may still be in the transition period (and thus activities covered by the Phase One budget).

For Phase Two, the Offeror should propose a budget that covers all aspects of program administration, using the program volumes described in Section 2.6. The Agency recommends that the Phase Two budget should be structured following the categories of activities requested in Questions 2 through 8 of Section 2 of this RFP, including:

- Question 2 - Program Administration/Management
- Question 3 – Information Technology Solutions
- Question 4 - Application Processing and Ongoing Management
- Question 5 - Participant and Customer Support
- Question 6 - Consumer Protections
- Question 7 - Labor and Minimum Equity Standard Compliance
- Question 8 - Marketing and Communications

3.2. TOTAL PRICE QUOTE

Please provide a two-year Total Price Quote to accomplish the Offeror's proposed implementation of the Illinois Shines and Illinois Solar for All Programs at the level of activity specified in Sections 2.2 and 3.1. This Total Price Quote should be the sum of the components listed in Section 3.3.

SECTION 3 – PRICING PROPOSAL

Please provide in Attachment NN detailed information to support the Price Quote, including a breakdown of proposed labor hours and rate by staff member, materials, out-of-pocket and travel expenses, and a breakdown of subcontractor expenses.⁵² Price Quotes shall not include any taxes. The Price Quote should also include a proposed maximum annual percentage increase in labor rates.

Please use the separate form provided by the IPA (Attachment NN⁵³) to detail the price breakdown to support each of the Price Quotes contained in Sections 3.1, 3.2, 3.3, and 3.4.

Offeror's Price Quote, at the discretion of the Agency, may or may not serve as the basis for compensation terms of any resulting contract. Price Quotes submitted as part of the Offeror's Proposal, however, will be used by the Agency to evaluate the Proposal, assist in selection of the winning Offeror, and form the basis for negotiation of the final contract.

Failure to submit a Prices Quote as shown in Sections 3.1-3.5 below (and to submit Attachment NN to support each Price Quote) will render Offeror's entire Proposal non- responsive.

Total Price Quote	\$ Click here to enter text.
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3.3. PRICE COMPONENTS

Please provide proposed price components in the table below and in Appendix NN, please provide details on how each component was determined, and also include a breakout of expenditures by direct labor, expenses, subcontractors.

In developing the Pricing Components, please use the following guidance:

Phase One

Process, Procedures, and Requirements Discovery

The Offeror should propose a discovery budget that includes the Offeror's costs for establishing its working relationship with the Agency and existing Program Administrators, in engaging in activities for the Offeror to learn the details of the programs (as discussed in Question 9 of Section 2.6), and to develop transition plans. This would include, but not be limited to, in depth interviews with existing Agency and program staff, detailed reviews of existing program materials, review of internal documents such as standard operating procedures and policy documentation, and targeted outreach to program stakeholders, including Illinois electric utilities, the Staff of the Illinois Commerce Commission, and Approved Vendors.

Technology Design and Development

The Offeror should propose a budget necessary to develop a program portal as described in Question 3 of Section 2.6. The portal must be fully operational to accept ILSFA and Illinois Shines applications by January 1, 2027.

⁵² Hourly Billing Rates shall not increase by more than 3% following the first year of the two-year initial term of prospective contract term.

⁵³ Available at: <https://ipa.illinois.gov/content/dam/soi/en/web/ipa/documents/26-rfp-01-rfp-pricing-support-spreadsheet.xlsx>.

SECTION 3 – PRICING PROPOSAL

Staff Recruitment and Training

The Offeror should propose a budget that covers the cost of building the team that will administer the programs, including recruitment and training.

Materials Development

The Offeror should propose a budget that includes the cost of developing program internal and external materials such as standard operating procedures, key performance indicators, assuming website administration, and updating of program documents, external communications templates, and other documents.

Project Management, Schedule, and Work Prioritization

The Offeror should propose a budget that allocates resources to the development of a comprehensive project plan to define transitional activities, including development of a detailed work schedule, work prioritization, and checkpoints to ensure Phase One segments are achieved as defined. This work plan should also include delineations between full-time employee assignments and temporary employees and/or contractors to achieve targeted deliverables.

Phase Two

Program Administration/Management

The Offeror should propose a budget that includes the resources needed for all aspects of administering and managing the two programs, including regular meetings with IPA staff, the development and reporting of key performance indicators, ongoing strategic planning, and responding to FOIA requests. See Section 2.6, and Appendix 7 (ILSFA Illustrative Tasks Sub-Task 1), and Appendix 8 (Illinois Shines Illustrative Tasks, Task 1) for guidance on the range of applicable responsibilities.

Information Technology Solutions

The Offeror should propose a budget that covers the cost to run the program portal and websites once operational, and to provide the development as needed of new functionality. The initial development cost of the portal and websites would be included in Section 1. The functionality to be offered and maintained is described in Section 2.6, and Appendix 7 and Appendix 8.

The proposed budget may include a set annual fee, as well as hourly, and project costs. Please specify costs for third-party solutions for websites, software licenses, fees, e-signing functionality, etc.

Application Processing and Ongoing Management

The Offeror should propose a budget that covers the staffing and related expenditures to process applications at the volumes described in Section 2.6 and the scopes contained in Appendices 7 and 8. This will include applications and renewals for Approved Vendors and Designees, Part I and Part II project applications (including project inspections), generating batches of projects for ICC approval, generating contracts and schedules for approved projects, Approved Vendor Annual Reports, and related activities. The budget should also include provisions for ramping staffing up or down to reflect actual program volumes.

Offerors may propose unit pricing for discrete application tasks in addition to, or in lieu of, proposed hourly rates.

SECTION 3 – PRICING PROPOSAL

Participant and Customer Support

The Offeror should propose a budget that covers the comprehensive range of works to support program participants and customers through a call center and electronic communications mediums. As described in Section 2.6 and Appendices 7 and 8, for program participants this would include working with potential and current Approved Vendors and designees, with specific focus on supporting Equity Eligible Contractors and Small and Emerging Business. Activities would include one on one communications, regular office hours, and periodic webinars and other educational activities. The Offeror should also be prepared to support inquiries from customers of distributed generation and community solar projects, including for ILSFA the administration of a competitively neutral referral program. The scope of the budget should also include development and updating of customer-facing program documents.

Consumer Protections

The Offeror should propose a budget to implement the wide range of consumer protection requirements of the programs as described in Section 2.6 and Appendices 7 and 8. The scope includes investigating complaints and administering any resulting disciplinary actions, reviewing marketing materials for program compliance, reviewing Approved Vendor and designee applications for consumer protections concerns, administering the Solar Restitution Program, the Escrow Process, and the REC adder process for stranded customers, leading a Consumer Protections Working Group, and developing an annual complaints report for filing with the Illinois Commerce Commission.

Labor and Minimum Equity Standard Compliance

The Offeror should propose a budget to ensure that program participants comply with labor and equity standards as described in Section 2.6 and Appendices 7 and 8. As part of project application processing this will include the review of Certified Payroll Transcripts and Project Labor Agreements acceptability for certain projects, requests for advances of capital for projects from Equity Eligible Contractors, and the utilization of job trainees for applicable ILSFA projects. The Offeror will also be responsible for reviewing Minimum Equity Standard compliance plans and year and reports, and working to provide additional support to vendors on Minimum Equity Standard compliance and in specific program categories such as the Illinois Shines Public Schools and Equity Eligible Contractors.

The Offeror should also include in the budget costs related to the development and administration of an annual Request for Proposals for ILSFA Grassroots Educators, and the staffing to manage the Grassroots Educators. Expenses for the resulting sub-contracts for the Grassroots Education will be contained as a separate pass-through line item in the final program budget.

The Offeror should also include in the budget the cost of maintaining online maps of Environmental Justice and Income Eligible communities.⁵⁴ The Agency expects that the updating of the maps after the approval of the 2026 Long-Term Plan will be completed by the incumbent ILSFA Program Administrator in the spring of 2026, however, the Offeror should be prepared to maintain the maps and update them in future years.⁵⁵

⁵⁴ See <https://www.illinoisfsa.com/environmental-justice-communities-map/> and <https://www.illinoisfsa.com/environmental-justice-communities-map/>.

⁵⁵ Offerors can refer to Section 8.12 of the 2026 Long-Term Plan which provides the current approach (during the 2026-27 and 2027-28 Program Years), with future changes being defined by the inputs and considerations at that time.

SECTION 3 – PRICING PROPOSAL

Marketing and Communications

The Offeror should prepare a budget to cover a full range of marketing and communications efforts to support the programs as described in Section 2.6 and Appendices 7 and 8. This includes developing and maintaining the website and program materials that comply with relevant program and Agency branding, and electronically publishing regular communications to program participants and stakeholders. The marketing and communications budget should include staffing and expenses for conducting targeted stakeholder engagement including conducting stakeholder feedback processes, strategically attending events, and coordinating with energy efficiency programs, community action agencies, and other relevant service providers. The marketing and communications budget should also include staffing for managing and responding to media and legislative inquiries.

	Number (#)	Dollars (\$)	Number (#)	Dollars (\$)	Dollars (\$)	Dollars (\$)
	Full-Time Equivalent In-House	Average In-House Hourly Rate	Full-Time Equivalent Subcontracted	Average Subcontracted Hourly Rate	Expenses	Offer Price
Phase One						
• Process, Procedures, and Requirements Discovery						
• Information Technology Development						
• Staff development/ recruiting/training						
• Materials development						
• Project Management, schedule, and work prioritization						
Phase Two						
• Program Administration/ Management						
• Information Technology Solutions						
• Application Processing and Ongoing Management						
• Participant and Customer Support						
• Consumer Protections						
• Labor and Minimum Equity Standard Compliance						
• Marketing and Communications						

SECTION 3 – PRICING PROPOSAL

- 3.4 Alternative Pricing Proposal (*Optional*):** In addition to providing the Price Quotes above, Offeror may use this Section to propose alternative pricing. Failure to provide an alternative Pricing Proposal will not render the Offeror's Proposal non-responsive.

Click here to enter text.

- 3.5 Type of Pricing:** The Illinois Office of the Comptroller requires the State to indicate whether the contract pricing is firm or estimated at the time it is submitted for obligation. Pricing pursuant to this solicitation and subsequent contract is estimated not-to-exceed proposed amount.

- 3.6 Expenses Allowed: Expenses** ☐ **are not allowed** ☒ **are allowed as follows:**

Note, for travel expenses, only preapproved travel in accordance with the State of Illinois Travel Guide will be authorized. <https://cms.illinois.gov/employees/travel.html>

- 3.7 DISCOUNT:** The State may receive a Click here to enter text % discount for payment within 30 days of receipt of correct invoice.

- 3.8 TAXES:** Pricing shall not include any taxes unless accompanied by proof the State is subject to the tax. If necessary, Offeror may request the applicable agency's Illinois tax exemption number and federal tax exemption information.

SIGNATURE OF AUTHORIZED REPRESENTATIVE: The undersigned authorized representative of the identified Offeror hereby submits this Pricing Proposal to perform in full compliance with this Solicitation.

Signature of Authorized Representative: _____

Printed Name of Signatory: Click here to enter text.

Date: Click here to enter a date.