

STATE OF ILLINOIS
REQUEST FOR QUALIFICATIONS

ILLINOIS POWER AGENCY
PROFESSIONAL SERVICES – ADJUSTABLE BLOCK PROGRAM ADMINISTRATION
Reference Number 22-RFQ-01

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

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

More information about the Program and the responsibilities of the Program Administrator can be found in 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 (“LTRRPP” or “Plan”).¹ The current websites for the ABP can be found at www.illinoisabp.com (vendor-facing) and www.illinoisshines.com (consumer-facing).

Pending legislation would substantially revise and expand the Illinois Renewable Portfolio Standard, including the Adjustable Block Program. This RFQ is being issued in anticipation of the enactment of that legislation and the expected significant expansion of the ABP, both in terms of the scope of the Program’s responsibilities and the volume of project applications to be processed. The Agency seeks a Program Administrator with resources and experience sufficient to manage the next phase of the Program. The Agency will issue an addendum to this RFQ if new legislation is passed before the due date for responses that will summarize key changes impacting the duties of the Program Administrator. It will be the responsibility of entities who are considering submitting a response to this RFQ to monitor the Agency’s website (www.illinois.gov/sites/ipa) for notice of the Addendum.

BACKGROUND: Pursuant to Public Act 99-0906, which amended and expanded the Illinois Renewable Portfolio Standard (“RPS”), the Agency has developed programs for the procurement of renewable energy credits from new photovoltaic systems under the Adjustable Block Program as well as the Illinois Solar for All Program. These programs are described and updated by the Agency as part of its Long-Term Renewable Resources Procurement Plan and subject to approval by the Illinois Commerce Commission (“ICC”).²

The Adjustable Block Program 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 through 15-year REC delivery contracts, with the added revenue and revenue certainty from those contracts incenting the development of new solar projects. Illinois law further requires that the Adjustable Block Program “shall be designed to provide a

¹ A copy of the current Plan can be found at: www2.illinois.gov/sites/ipa/Pages/Renewable_Resources.aspx. The ABP is described primarily in Chapters 6 and 7.

² Absent legislative changes, the Long-Term Plan will be revised this year and the Agency anticipates the ICC approval in early 2022.

³ 20 ILCS 3855/1-75(c)(1)(K).

INTRODUCTION

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 As a block fills through developers’ proposed photovoltaic project applications, a new block opens at a different (and typically lower) REC price, requiring active management and administration for successful implementation of the Program. The Program launched in early 2019, and as of December 2020 all blocks of available capacity have been filled and project applications are being placed on waitlists.

Public Act 99-0906 authorizes the Agency to “retain one or more experts or expert consulting firms to develop, administer, implement, operate, and evaluate the Adjustable Block Program.”⁵ This includes the development of program forms, requirements, guidelines, processes, websites, and applicant interfaces necessary for successful program administration, while also managing and executing ongoing processes for the continued refinement and improvement of these items and updating these items based on changes in law or changes in the Agency’s Long-Term Renewable Resources Procurement Plan. The Agency selected the incumbent Program Administrator through a RFQ/RFP process conducted in 2018.

This solicitation represents the first step in the Agency’s process of retaining a Program Administrator to comprehensively manage the ongoing administration, operation, and expansion of the Program as it is expected to grow in size, scope, and complexity. Upon completion of the RFQ response evaluation process, Offerors rated as qualified by the Agency will receive a subsequent Request for Proposals. If selected through the RFP process, the selected Offeror will be expected to enter into a binding contract with the Agency to administer the Adjustable Block Program. This RFQ/RFP is exempt from the procedures in the State of Illinois Procurement Code pursuant to Section 1-25(2) of the Illinois Power Agency Act (20 ILCS 3855/1-25(2)) and contains alternative bidding procedures pursuant to Section 20-10(i) of the Illinois Procurement Code (30 ILCS 500/20-10(i)).

BRIEF DESCRIPTION: The Agency seeks a third-party Program Administrator to administer all or a portion of the Adjustable Block Program as identified in the Agency’s LTRRPP mentioned above, with the anticipation that the scope of the Program Administrator’s work will be expanding through legislation in the coming weeks or months. The Adjustable Block Program Administrator will not be responsible for competitive procurements conducted by the Agency through its separate third-party Procurement Administrator,⁶ or for the primary administration of the Agency’s Illinois Solar for All program (described under Section 1-56(b) of the IPA Act), although the Program Administrator will be expected to coordinate with the Illinois Solar for All Program Administrator on certain tasks as described in Section 2.2 below.

Offerors must meet the minimum qualifications listed below:

- A. Direct previous experience managing the operation of large-scale programs to incent the development of new distributed renewable energy generation systems and new community solar generation projects.
- B. Expertise in solar energy market models for both distributed generation and community solar including, but not limited to, project development and/or financing protocols, sales models, familiarity with renewable energy credit (“REC”) purchase and sales contract protocols and administration, and experience with RPS compliance rules and protocols.

⁴ Id.

⁵ 20 ILCS 3855/1-75(c)(1)(M).

⁶ See Chapter 5 of the LTRRPP for a description of the competitive procurements.

INTRODUCTION

- C. Expertise in developing, managing, and overseeing consumer protections.
- D. Expertise in consumer complaint tracking, management, and resolution.
- E. Adequate legal resources to assist in the prevention and resolution of issues.
- F. Expertise in writing manuals, procedures, protocols, and developing clear and well-written internal and external communications.
- G. Technical expertise in the design and installation of photovoltaic systems.
- H. Expertise in assessment and evaluation of third party documentation and compliance plans (e.g., land use permits, project labor agreements, MWBE certifications).
- I. Expertise in project management and the development of project workplans and schedules.
- J. Expertise in data management and reporting, including data analysis for identifying program trends and deficiencies.
- K. Expertise in website/portal design and ongoing management.
- L. Sufficient resources to successfully and comprehensively perform and fulfill the required functions and responsibilities for a program that will be processing project applications numbering in the tens of thousands annually.
- M. Experience supporting programs on behalf of public agencies and familiarity with the risks and challenges faced by public agencies.
- N. The absence of a conflict of interest and inappropriate bias for or against potential program participants or the affected electric utilities. All actual, potential, and/or perceived conflicts should be disclosed in response to this Request for Qualifications.

The Agency intends to identify Offerors that can provide a comprehensive suite of administrative functions for the Program as identified in the Agency's LTRRPP as well as anticipated additional responsibilities stemming from pending legislation, in particular the ability to provide robust administrative review related to fulfilling labor and equity provisions. In 2020, the Program received over 17,000 project applications, and the Agency expects this level of activity could initially double or triple once new legislation is enacted. Based on drafts of proposed legislation, the Agency expects for the Program to feature new requirements related to diversity, equity, and project labor requirements; for the number of separate categories of projects within the Adjustable Block Program to expand from three to six; and for individual project categories to, in some cases, feature more complex and intensive application review. Offerors should be prepared to ramp up program support to meet expanding levels of activity.

The Agency's initial preference is to retain a single Program Administrator; however, the Agency reserves the right to determine whether a single administrator or multiple administrators are optimal.

It is expected that the contract resulting from this solicitation and any subsequent RFP with the awarded Offeror will have a term of up to five (5) years, with an initial two-year term and annual renewals at the Agency's discretion.

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

SOLICITATION OUTLINE

SOLICITATION OUTLINE

Instructions for Submitting Offers

How to Enter Information.....	I.1
Published Procurement Information.....	I.2
Solicitation Contact.....	I.3
Offeror Questions and Agency Response.....	I.4
Submission Due Date, Time, and Address for Submission	I.5
Instructions for Submission of Qualifications.....	I.6
Governing Law and Forum	I.7
Public Records and Requests for Confidential Treatment	I.8
Reservations	I.9
Award	I.10
Incorporation of 22-RFQ-01 by Reference	I.11
Prequalification to Respond to Subsequent RFP.....	I.12
Evaluation Process.....	I.13
Selection of Offerors.....	I.14
Minority, Female, and Persons with Disability Participation and Utilization Plan	I.15
Subcontracting.....	I.16
Timeline	I.17

Section 1 – Submittal of Qualifications Check List

Check List.....	1.1 - 1.8
Signature of Authorized Representative	1.9

Section 2 - Technical Proposal

Goal.....	2.1
Expertise, Experience and Services Required.....	2.2
Milestones and Deliverables.....	2.3
Staff Specifications.....	2.4
Offeror Qualifications	2.5
Offeror Statement of Qualifications.....	2.6
Supplemental Information	2.7

INSTRUCTIONS

INSTRUCTIONS FOR SUBMITTING QUALIFICATIONS

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

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

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

- I.4 OFFEROR QUESTIONS AND AGENCY RESPONSE:** All questions, other than those raised at any Offeror conference call, that pertain to this solicitation must be submitted in written form and submitted to the Solicitation Contact no later than August 6, 2021. Questions received and

INSTRUCTIONS

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

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

Submittal due Date & Time:

Date: September 3, 2021
Time: 5:00 PM CPT

Submit/Deliver Submittals To:

Agency: Illinois Power Agency
Attn: Sanjay Patel
Address: 105 W. Madison St., Suite 1401
City, State Zip: Chicago, IL 60602
Solicitation Title & Reference # Request for Qualifications – Adjustable Block Program Administrator, 22-RFQ-01 Offeror Name: _____

(Place label containing information above outside of sealed envelope/container if submitting response in hard copy.)

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

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

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

Use of Option (1) is strongly encouraged.

INSTRUCTIONS

- I.7 GOVERNING LAW AND FORUM:** Illinois law and rule govern this solicitation and any resulting contract. Offeror must bring any action relating to this solicitation or any resulting contract in the appropriate court in Illinois. This document contains statutory references to the Illinois Compiled Statutes designated with "ILCS". Offeror may view the full text at (www.ilga.gov/legislation/ilcs/ilcs.asp). Section 1-75(c) of the Illinois Power Agency Act (20 ILCS 3855/1-75(c)) is applicable to this solicitation.
- I.8 PUBLIC RECORDS AND REQUESTS FOR CONFIDENTIAL TREATMENT:** Submittals of Qualifications become the property of the Agency. Submittals of Qualifications, including late submissions, will not be returned. Upon conclusion of this selection process, all submittals will be open to the public under the Illinois Freedom of Information Act ("FOIA") (5 ILCS 140) and other applicable laws and rules, unless Offeror requests in its submittal that the Agency treat certain information as confidential. A request for confidential treatment will not supersede the State's legal obligations under FOIA. The Agency will not honor requests to keep entire submittals confidential. Offerors must show the specific grounds in FOIA or other law or rule that support confidential treatment. Regardless, the Agency will disclose the successful Offeror's name and the substance of the submittal upon final contract award. If Offeror requests confidential treatment, Offeror must submit one additional copy of the Submittal of Qualifications with proposed confidential information redacted. This redacted copy must describe the general nature of the material removed, and shall retain as much of the Submittal of Qualifications as possible. In a separate attachment, Offeror shall supply a listing of the provisions identified by section number for which it seeks confidential treatment and identify the statutory basis under Illinois law and include a detailed justification for exempting the information from public disclosure. Offeror will hold harmless and indemnify the Agency for all costs or damages associated with the Agency defending Offeror's request for confidential treatment. Offeror agrees the Agency may copy the Submittal of Qualifications to facilitate evaluation, or to respond to requests for public records. Offeror warrants that such copying will not violate the rights of any third party.
- I.9 RESERVATIONS:** Offeror must read and understand the solicitation and tailor the Submittal of Qualifications and all activities to ensure compliance. The Agency reserves the right to amend the solicitation, reject any or all submittals, cancel the solicitation, and waive minor defects. The Agency may request a clarification, inspect Offeror's premises, interview staff, request a presentation, or otherwise verify the contents of the submittal, including information about subcontractors and suppliers. The Agency will make all decisions on compliance, evaluation, terms and conditions, and shall make decisions in the best interests of the Agency and in accordance with rules and other applicable state and federal statutes and regulations. This competitive process may require that Offeror provide additional information and otherwise cooperate with the Agency. If an Offeror does not comply with requests for information and cooperate, the Agency may reject the Submittal of Qualifications as non-responsive to the solicitation. Submitting a Submittal of Qualifications does not entitle Offeror to an award or a contract. Posting Offeror's name in a Bulletin notice does not entitle Offeror to a contract. The Agency is not responsible for and will not pay any costs associated with the preparation and submission of any Submittal of Qualifications. Short-listed Offeror(s) for contract award shall not commence and will not be paid for any billable work prior to the date all parties execute the contract and subsequent work order authorizations (Task Orders).
- 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

INSTRUCTIONS

outlined in Section 1-75(c) of the Illinois Power Agency Act (20 ILCS 3855/1-75(c)). As a result of this solicitation and any subsequent RFP, the Agency may select the winning Offeror based on the winning proposal and may award a contract for up to a five-year term. If the Agency issues an award as the result of this solicitation and any subsequent RFP, the award will be made to the Responsible Offeror who best meets the specified requirements of this solicitation and any subsequent RFP. The approval of any contract resulting from the RFP will be subject to approval by the Illinois Commerce Commission, as required by Section 1-75(c)(1)(M) of the Illinois Power Agency Act and Section 16-111.5(b)(5) of the Illinois Public Utilities Act (220 ILCS 5).

- I.11 INCORPORATION OF 22-RFQ-01 BY REFERENCE:** This solicitation (22-RFQ-01) and Offeror's Submittal of Qualifications will be incorporated and made part of any subsequent contract by reference.
- I.12 PREQUALIFICATION TO RESPOND TO SUBSEQUENT RFP:** Based on the evaluation of responses and approval process described in this solicitation, qualified Offerors will be invited to respond to the subsequent RFP.
- I.13 EVALUATION PROCESS:** The Agency determines how completely and satisfactorily submittals meet the Responsiveness and Responsibility requirements. Submittals that fail to meet minimum Responsiveness and Responsibility requirements will not be considered for subsequent evaluation. The Agency considers the information provided when evaluating submittals. If the Agency finds a failure or deficiency, the Agency may reject the submittal or reflect the failure or deficiency in the evaluation.

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

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

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

INSTRUCTIONS

Other factors that the Agency may evaluate to determine Responsibility (including those found outside the Submittal of Qualifications) include, but are not limited to: political contributions, certifications, conflicts of interest, financial disclosures, past performance in business or industry, references, compliance with applicable laws, financial responsibility, insurability, effective equal opportunity compliance, and payment of prevailing wages if required by law.

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

Expertise, Skills, Experience and Qualifications Requirements
A. Direct previous experience managing the operation of large-scale programs to incent the development of new distributed renewable energy generation systems and new community solar generation projects.
B. Expertise in solar energy market models for both distributed generation and community solar including, but not limited to, project development and/or financing protocols, sales models, familiarity with renewable energy credit ("REC") purchase and sales contract protocols and administration, and experience with RPS compliance rules and protocols.
C. Expertise in developing, managing, and overseeing consumer protections.
D. Expertise in consumer complaint tracking, management, and resolution.
E. Adequate legal resources to assist in the prevention and resolution of issues.
F. Expertise in writing manuals, procedures, protocols, and developing clear and well-written internal and external communications.
G. Technical expertise in the design and installation of photovoltaic systems.
H. Expertise in assessment and evaluation of third party documentation and compliance plans (e.g., land use permits, project labor agreements, MWBE certification).
I. Expertise in project management and the development of project workplans and schedules.
J. Expertise in data management and reporting, including data analysis for identifying program trends and deficiencies.
K. Expertise in website/portal design and ongoing management.
L. Sufficient resources to successfully and comprehensively perform and fulfill the required functions and responsibilities for a program that will be processing project applications numbering in the tens of thousands annually.
M. Experience supporting programs on behalf of public agencies, and familiarity with the risks and challenges faced by public agencies.
N. The absence of a conflict of interest and inappropriate bias for or against potential program participants or the affected electric utilities.

If the Offeror proposes to meet these criteria through a team that includes sub-contractors where a specific criterion is only met by participation by an identified sub-

INSTRUCTIONS

contractor, and the Offeror is determined to be a qualified Offeror invited to respond to the subsequent RFP, then the qualified Offer must either (i) maintain the same sub-contractors in the resulting response to that RFP, or (ii) if a sub-contractor who was used for the purpose RFQ qualification is replaced on the project team, then the qualified Offeror must submit to the Agency for consideration information regarding replacement sub-contractors that fulfill the RFQ qualification requirements at least 30 days prior to the due date of the RFP response. If the Agency determines that the replacement sub-contractor does not meet the RFQ qualification requirements, then the Offeror will no longer be considered a qualified Offeror and an RFP submittal from that Offeror will not be accepted or evaluated.

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

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

- I.15 MINORITY, FEMALE, AND PERSONS WITH DISABILITY PARTICIPATION AND UTILIZATION PLAN:** Any subsequent RFP solicitation is expected to contain a 20% goal to include businesses owned and controlled by minorities, females, and persons with disabilities in the State's procurement and contracting processes.

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

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

Please note that the Business Enterprise Program is currently undergoing modifications pursuant to Public Act 101-0657 and any subsequent RFP may contain updated guidance and provisions to reflect those modifications.

A primer video on completing a utilization plan can be found at:

www.youtube.com/watch?app=desktop&v=j9jXidHR7-U

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

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

⁷ See:

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

INSTRUCTIONS

- An Offeror who elects to utilize BEP certified subcontractor(s) to meet the goal must provide executed Letter(s) of Intent for all such subcontractors in addition to the Utilization Plan.
- 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” as part of their submittal. All questions regarding the subcontracting goal must be directed to the Agency BEP Liaison prior to submission of proposals.

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

I.17 TIMELINE: The Agency plans to follow the timeline below to contract for the professional services of an Illinois Solar for All Program Evaluator:

- RFQ Issued: July 21, 2021
- RFQ Offerors Conference Call: August 4, 2021, 1 PM CPT⁸
- RFQ Questions deadline, August 6, 2021, 5 PM CPT
- RFQ Responses due: September 3, 2021, 5 PM CPT
- Offerors notified of eligibility: September 24, 2021 (tentative)
- RFP Issued: October 1, 2021 (tentative)
- RFP Responses Due: November 22, 2021 (tentative)
- Award made (subject to ICC approval): December 24, 2021 (tentative)
- Contract start date: January 17, 2021 (tentative)

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

SECTION 1 - SUBMITTAL OF QUALIFICATIONS CHECK LIST

SUBMITTAL OF QUALIFICATIONS CHECK LIST

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

CHECK LIST:

- 1.1. SOLICITATION REVIEW:** Offeror reviewed the solicitation, including all referenced documents, laws, and instructions, completed all blanks, provided all required information, and demonstrated how it will meet the requirements of the Agency.
 Yes No
- 1.2. INCORPORATION OF 22-RFQ-01 BY REFERENCE:** Offeror acknowledges that this solicitation (22-RFQ-01) and Offeror's responses to it will be incorporated and made part of any subsequent contract by reference.
 Yes No
- 1.3. ADDENDA:** Offeror acknowledges receipt of any and all addendums to this solicitation and has taken those into account in making this Submittal of Qualifications.
 Yes No
- 1.4. SUBMISSION OF TECHNICAL PROPOSAL - Section 2:** Offeror is submitting a complete and responsive statement of qualifications, in a properly labeled e-mail or container, to the correct e-mail address or location, and by the due date and time.
 Yes No
- 1.5. EXPERTISE, EXPERIENCE AND STAFF:** Offeror has the required expertise, skill, experience staff, and ability to meet the requirements of the Agency in Sections 2.2 and 2.3.
 Yes No
- 1.6. MILESTONES AND DELIVERABLES:** Offeror- has the capability to meet the Agency's milestones and deliverables requirements in Sections 2.2 and 2.3.
 Yes No
- 1.7. OFFEROR STATEMENT OF QUALIFICATIONS:** Offeror has provided a complete statement of qualifications in Section 2.6.
 Yes No
- 1.8. OFFEROR SUPPLEMENTAL INFORMTAION:** Offeror has provided a high-level narrative of their proposed approach, an indicative pricing estimate, and any additional information.
 Yes No
- 1.9. SIGNATURE OF AUTHORIZED REPRESENTATIVE:** The undersigned authorized representative of the identified Offeror hereby submits this Submittal of Qualifications in full compliance with this solicitation.

Signature of Authorized Representative: _____

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

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

Section 2 - Technical Proposal

- 2.1. GOAL:** The Agency seeks a qualified Program Administrator. The Program Administrator will assist the Agency in meeting its mission to carry out the objectives of the Adjustable Block Program (“ABP”) in accordance with Section 1-75(c) of the Illinois Power Agency Act.
- 2.2. EXPERTISE, EXPERIENCE AND SERVICES REQUIRED:** The Agency requires services from qualified Offerors that, at a minimum, have the following experience and qualifications.
- A. Direct previous experience managing the operation of large-scale programs to incent the development of new distributed renewable energy generation systems and new community solar generation projects.
 - B. Expertise in solar energy market models for both distributed generation and community solar including, but not limited to, project development and/or financing protocols, sales models, familiarity with renewable energy credit (“REC”) purchase and sales contract protocols and administration, and experience with RPS compliance rules and protocols.
 - C. Expertise in developing, managing, and overseeing consumer protections.
 - D. Expertise in consumer complaint tracking, management, and resolution.
 - E. Adequate legal resources to assist in the prevention and resolution of issues.
 - F. Expertise in writing manuals, procedures, protocols, and developing clear and well-written internal and external communications.
 - G. Technical expertise (i.e., engineering) in the design and installation of photovoltaic systems.
 - H. Expertise in assessment and evaluation of third party documentation and compliance plans (e.g., land use permits, project labor agreements, MWBE certification)
 - I. Expertise in project management and the development of project workplans and schedules.
 - J. Expertise in data management and reporting, including data analysis for identifying program trends and deficiencies.
 - K. Expertise in website/portal design and ongoing management.
 - L. Sufficient resources to successfully and comprehensively perform and fulfill the required functions and responsibilities for a program that will be handling tens of thousands of project applications annually.
 - M. Experience supporting programs on behalf of public agencies and familiarity with the risks and challenges faced by public agencies.
 - N. The absence of a conflict of interest and inappropriate bias for or against potential program participants or the affected electric utilities. All actual conflicts, potential conflicts, or perceived conflicts should be disclosed in response to this Request for Qualifications.

The Program Administrator, with input from the Agency, will be required to complete, at minimum, the following ongoing tasks to ensure comprehensive and compliant administration of the ABP, pursuant to Section 1-75(c) of the Illinois Power Agency Act, the Agency’s Long-Term Renewable Resources Procurement Plan, and any applicable subsequent legislative changes.

- Manage Approved Vendor and Approved Vendor Designee application approval, renewal, registration, and training.
- Maintain and update Program Manual and associated policies and procedures.

Section 2 - Technical Proposal

- Maintain program website and online portal for Approved Vendors to submit projects and collect application fees; maintain an online dashboard to show block status and other relevant program data and information.
- Provide technical support to Approved Vendors and Designees.
- Generate and manage consumer protection-related documents, including disclosure forms for distributed generation projects and community solar subscribers.
- Review and approve project applications.
- Prepare REC delivery contracts for ICC approval and utility execution.
- Monitor ongoing project development status.
- Verify information submitted for the completion of projects.
- Calculate REC payment amounts and process approvals for payments.
- Monitor community solar subscription levels on a quarterly basis and calculate REC payment adjustments as applicable.
- Conduct project inspections for quality assurance purposes.
- Review Annual Reports submitted by Approved Vendors and verify ongoing REC delivery performance.
- Manage annual Approved Vendor re-reregistration process
- Provide information for the public through the consumer-facing Illinois Shines website while also maintaining the program brand, maintaining online lists of Approved Vendors and community solar projects, providing public information on consumer complaints and disciplinary actions, and providing educational materials related to distributed generation and community solar.
- Oversee Approved Vendor and Designee compliance with Program consumer protection requirements.
- Receive, investigate, and work towards resolution for consumer complaints
- Monitor social media related to program.
- Staff call center to answer questions or comments related to the operations of the Program.
- Maintain program database(s) and provide reports to the IPA, including data analysis about program trends and suggestions for program improvements.
- Provide technical and policy support to the Agency, as needed, in the development of new program components, requirements, and terms and conditions.
- Coordinate with utilities on project and contract management including provision of reports as needed to monitor project statuses, and facility correct invoicing.
- Under the direction of the IPA coordinate with other state agencies including the Illinois Commerce Commission and the Office of the Illinois Attorney General on regulatory and program related matters.
- Assist in workforce development efforts to the extent feasible.

This set of tasks is based upon the program design for the ABP contained in the LTRRPP. It will be the responsibility of Offerors to review the LTRRPP and current program implementation.⁹ The LTRRPP is subject to review and approval by the Illinois Commerce Commission on a biennial basis and will be updated this year for approval in early 2022. In addition, pending legislation is expecting to expand the scope of the Adjustable Block Program and thus the duties

⁹ See: www.illinoisabp.com (vendor-facing website) and www.illinoisshines.com (consumer-facing web-site).

Section 2 - Technical Proposal

of the Program Administrator. Based on recent drafts of pending legislation, potential changes to the Program include:

- Expansion of the program and block sizes through additional funding availability. The Agency currently estimates an expansion of at least two to three times the current volume of project applications (approximately 17,000 in 2020).
- Additional provisions for program participants related to prevailing wages, project labor agreements, and equity and diversity standards and certifications. It will be the Program Administrator's responsibility to monitor and verify compliance with these new provisions.
- Additional program categories for public schools, community-driven community solar projects, and projects to promote participation by diverse contractors.

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

The Approved Vendor will also coordinate as needed with the Illinois Solar for All Program Administrator(s) engaged by the Agency pursuant to Section 1-56(b)(5) of the Act. This will include support on preparation of REC contracts for Solar for All projects, coordination on Approved Vendor registrations between programs, and active information sharing on consumer complaints and disciplinary actions.

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

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

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

2.4. STAFF SPECIFICATIONS: The Offeror must have adequate staff with the necessary skill and experience to perform the requirements specified in Sections 2.2 and Section 2.3 above in a timely and efficient manner. Please include in the Offeror Statement of Qualifications in Section 2.6 a listing and description of key staff that will be used to meet these requirements, as well as a description of the planned staffing resources anticipated for project application processing and review, call center operations, technical support, and the management consumer complaints.

2.5. OFFEROR QUALIFICATIONS: Please refer to Section 2.2 above. For each of the Minimum Requirement items in the table below, by entering Yes or No state whether the offeror meets the minimum requirement. Failure to meet any of the requirements will automatically disqualify the Offeror.

Section 2 - Technical Proposal

Minimum Requirement	Offeror must state below whether its staff meet each Minimum Requirement by entering Yes or No
A. Direct previous experience managing the operation of large-scale programs to incent the development of new distributed renewable energy generation systems and new community solar generation projects.	Click here to enter text.
B. Expertise in solar energy market models for both distributed generation and community solar including, but not limited to project development and/or financing protocols, sales models, familiarity with renewable energy credit ("REC") purchase and sales contract protocols and administration, and experience with RPS compliance rules and protocols.	Click here to enter text.
C. Expertise in developing, managing, and overseeing consumer protections.	Click here to enter text.
D. Expertise in consumer complaint tracking, management, and resolution.	Click here to enter text.
E. Adequate legal resources to assist in the prevention and resolution of issues.	Click here to enter text.
F. Expertise in writing manuals, procedures, protocols, and developing clear and well-written internal and external communications.	Click here to enter text.
G. Expertise in assessment and evaluation of third party documentation and compliance plans (e.g., land use permits, project labor agreements, MWBE certification).	Click here to enter text.
H. Technical expertise (i.e., engineering) in the design and installation of photovoltaic systems.	Click here to enter text.
I. Expertise in project management and the development of project workplans and schedules.	Click here to enter text.
J. Expertise in data management and reporting, including data analysis for identifying program trends and deficiencies.	Click here to enter text.
K. Expertise in website/portal design and ongoing management.	Click here to enter text.

Section 2 - Technical Proposal

L. Sufficient resources to successfully and comprehensively perform and fulfill the required functions and responsibilities for a program that will be handling tens of thousands of project applications.	Click here to enter text.
M. Experience supporting programs on behalf of public agencies, and familiarity with the risks and challenges faced by public entities.	Click here to enter text.
N. The absence of a conflict of interest and inappropriate bias for or against potential program participants or the affected electric utilities. All actual conflicts, potential conflicts, or perceived conflicts should be disclosed in response to this Request for Qualifications.	Click here to enter text.

- 2.6. OFFEROR STATEMENT OF QUALIFICATIONS:** Please describe Offeror’s background, experience, and qualifications relevant to the role of the Agency’s Adjustable Block Program Administrator. Be sure to specifically address **each** of the fourteen criteria (A-N) listed in Section 2.5. Please limit the statement of qualifications to no more than thirty (30) pages (not including resumes of key staff). Please do not submit marketing materials. The response to this section may also be included as an attachment to the response.

[Click here to enter text.](#)

- 2.7. SUPPLEMENTAL INFORMATION:** Please supplemental information using the table below, or indicate if responses are contained in a separate document.

Please provide a brief high-level narrative of the Offeror’s proposed approach including, but not limited to, software platform(s) to be utilized, sub-contractors/program partners, and how the Offeror would transition operations from the current administrator. Please limit response to ten pages.	Click here to enter text.
--	---

Please provide an indicative pricing estimate. The Agency will use this for informational and budget planning purposes only. Indicative pricing estimates are not binding and may be revised during the response to the RFP. Please indicate fixed (annual) costs and variable (e.g., per-project application and/or per-batch) costs.	Click here to enter text.
--	---

Please provide additional information which may assist the Agency to assess the Offeror’s background, experience, qualifications. Limit response to five pages. Do not send marketing materials.	Click here to enter text.
--	---

Section 2 - Technical Proposal

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

Signature of Authorized Representative: _____

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

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