Request for Proposals

Assessment of Ameren Illinois Market Development Initiative

Contract Term: December, 2022 – December, 2025

Issued By:



**Issued:**

**September 6, 2022**

**Proposals Due:**

**October 14, 2022, 4:00 PM**

**(Central Time)**

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# **Introduction and Summary**

## Introduction

Ameren Illinois Company (“AIC”), through its independent third party, ENCOLOR LLC, is issuing this Request for Proposal (“RFP”) to identify a supplier to perform certain Assessments of its Energy Efficiency Market Development Initiative (“MDI”).

Ameren Corporation is a Fortune 500 company that trades on the New York Stock Exchange under the symbol AEE. Ameren Corporation, located in St. Louis, Missouri, is the parent company of AIC, which is based in Collinsville, Illinois.

The AIC service territory spans 43,700 square miles across the lower three-quarters of Illinois. AIC serves approximately 1.2 million electric and 806,000 natural gas customers across 1,200 communities. AIC's delivery system includes about 4,500 miles of electric transmission lines, 45,400 miles of distribution lines, 18,000 miles of natural gas transmission and distribution mains and 12 underground natural gas storage fields. AIC also offers a broad portfolio of initiatives under its energy efficiency programs to its eligible customers throughout the AIC service territory. Find more information regarding AIC at [www.AmerenIllinois.com](http://www.AmerenIllinois.com) and Ameren Illinois energy efficiency programs (including MDI) at [www.AmerenIllinoisSavings.com](http://www.AmerenIllinoisSavings.com).

ENCOLOR LLC, an independent third-party, is working with AIC to facilitate the RFP process. The main contact for Bidder(s) is:

Quinn Parker
CEO and Founder, ENCOLOR LLC
AmerenIL\_MDI\_RFP@encolorconsulting.com[[1]](#footnote-1)

Information about the RFP, including any updates to the RFP and resources for Bidder(s), will be posted at [www.AmerenIllinoisSavings.com/RFP](http://www.amerenillinoissavings.com/RFP).

## Description of the Market Development Initiative

AIC created the MDI in 2018 to promote new economic and energy efficiency opportunities for diverse individuals, individual seeking employment opportunities in the clean energy industry, and communities anywhere in AIC’s service territory.[[2]](#footnote-2) AIC’s award-winning MDI program has three foundational goals:

* Engage underserved customers: deliver targeted energy efficiency education and data-driven, neighborhood-based program approaches to underserved communities, accounting for factors such as income, diversity and unemployment, among others.
* Build a diverse workforce: Increase the number of local and diverse participants in the energy efficiency workforce and help develop the next generation of clean energy economy workforce.
* Support diverse businesses: Strengthen the partnership and support for local and diverse business enterprises, including identifying opportunities to diversify spend through contracting with local and/or diverse business enterprises and non-profit organizations.

The MDI mission is to transform how AIC’s Energy Efficiency Programs operate in every area. AIC recognizes that energy efficiency services and the associated benefits can spur local economic development – especially in low-income communities and neighborhoods. All customers – regardless of income or socioeconomic status – should have access to incentives that help them overcome participation barriers, complete energy-saving upgrades, and increase their quality of life.

The MDI program encourages action through education and financial incentives that offset the cost of energy-saving upgrades.

Beginning in 2018, over $2.9 million per year has been dedicated for MDI. MDI achievements include, but are not limited to, the following:

* MDI has partnered with 117 community-based organizations
* Engaged over 240,000 customers
* Provided 88 scholarships at 6 community colleges
* Funded 64 internships
* Increased spending with diverse business enterprises to over $72 million

MDI closely integrates with both the AIC business and residential energy efficiency programs on day-to-day operations and customer interactions, helping to identify more project opportunities, maximize customer touchpoints, and create a streamlined process for participation. Through our energy efficiency initiatives and MDI, AIC seeks to build greater community engagement, create energy industry jobs, and deliver cost savings to those that need it the most.

Together, our Energy Efficiency Portfolio and MDI will achieve **Energy Efficiency for All**. For more information about MDI, please see [www.AmerenIllinoisSavings.com/mdi/](http://www.AmerenIllinoisSavings.com/mdi/).

## Overview of Market Development Initiative Assessment

AIC is looking for an exceptional business partner that has proven organizational and staff experience with research, evaluation, strategic planning, effective collaboration, expert program/project management to conduct two assessments of the MDI. The first assessment is expected to begin in late 2022 and the second assessment will begin in late 2024. The focus of the assessments is on two key channels of the MDI:

* Community Based Organizations Partner Strategies—an effort to ensure that community-based organizations have access to information and resources to encourage their constituents are able to participate in clean energy programs
* Diverse Vendor Procurement Program—efforts to identify ready, willing, and able diverse firms offering services in the Ameren Illinois service area and expand the opportunities to contract with these firms through outreach, education, and financial and technical support

Simply, the purpose of the assessment is to:

* Identify ways in which the MDI is performing well and making progress towards achieving overall goals and objectives
* Identify any areas in which there may be room for improvement
* Understand best practices
* Provide actionable recommendations for improvement

The assessment will support the continuous improvement of MDI function, impact, and customer experience while advancing AIC's MDI goals and objectives described in 1.2 above, including without limitation to Diversity, Equity, and Inclusion.

# **Solicitation Process**

Bidder(s) interested in submitting a proposal in response to this RFP must adhere to the solicitation process described below. Failure to comply with the requirements and deadlines may result in disqualification.

## Schedule

|  |  |
| --- | --- |
| RFP Release Date | September 6, 2022 |
| Bidders Conference Call | September 13, 2022 |
| Bidder Questions Submitted | September 26, 2022 |
| Responses to Bidder(s) Questions | September 26–30, 2022 |
| Intent to Bid Due  | October 5, 2022 |
| Bidder Proposal(s) Submission Due\* | October 14, 2022 |
| Proposal Review & Bidder Selection\* | October/November, 2022 |
| Notification of Bid Selection(s)\* | November, 2022 |
| Contracting\* | November/December, 2022 |
| \*Estimated dates, subject to change |

## Bidders Pre-proposal Conference Call

Interested bidder(s) are encouraged, although not required, to participate in a pre-proposal Bidders conference call. Additional information about the conference call will be posted at [www.AmerenIllinoisSavings.com/RFP](http://www.AmerenIllinoisSavings.com/RFP). The conference call will provide interested firms with an opportunity to seek clarification on the requirements of this RFP.

Below are the schedule and instructions for the conference call. Participants are encouraged to use Google Chrome or Microsoft Edge to access the meeting.

* Date: September 13, 2022
* Time: 2:00 – 3:30 PM CDT
* Join via computer or mobile phone: [Click here to join the meeting](https://teams.microsoft.com/l/meetup-join/19%3Ameeting_OTBjOGQyNzAtNDk3ZS00YmNiLTg3NmUtZTZhY2IwMTE0OTIw%40thread.v2/0?context=%7b%22Tid%22%3a%22fa91b29d-ba21-402f-b47a-c225ae57ffe9%22%2c%22Oid%22%3a%22dbdb2a3f-5ba5-4f76-9ab1-a73766f0ad82%22%7d)
* or copy this address into your browser [https://teams.microsoft.com/l/meetup-join/19%3ameeting\_OTBjOGQyNzAtNDk3ZS00YmNiLTg3NmUtZTZhY2IwMTE0OTIw%40thread.v2/0?context=%7b%22Tid%22%3a%22fa91b29d-ba21-402f-b47a-c225ae57ffe9%22%2c%22Oid%22%3a%22dbdb2a3f-5ba5-4f76-9ab1-a73766f0ad82%22%7d](https://teams.microsoft.com/l/meetup-join/19%3Ameeting_OTBjOGQyNzAtNDk3ZS00YmNiLTg3NmUtZTZhY2IwMTE0OTIw%40thread.v2/0?context=%7b%22Tid%22%3a%22fa91b29d-ba21-402f-b47a-c225ae57ffe9%22%2c%22Oid%22%3a%22dbdb2a3f-5ba5-4f76-9ab1-a73766f0ad82%22%7d)
* Call-in number (audio only): 312-667-7160, United States, Chicago
* Access Code: 856706150#

## RFP Questions, Inquiries, Clarifications

Questions, inquiries, and clarifications regarding this RFP should be received no later than 4:00 PM Central Time on September 26, 2022. Questions should be sent by encrypted email to AmerenIL\_MDI\_RFP@encolorconsulting.com. Responses to questions received by September 19, 2022, will be posted on [www.AmerenIllinoisSavings.com/RFP](http://www.AmerenIllinoisSavings.com/RFP) by September 26, 2022. Responses to questions received after September 19, 2022, will be provided by September 30, 2022. Responses will also be emailed to Bidder(s) who have submitted an Intent to Bid.

## Intent to Bid

Bidder(s) are encouraged to submit a notification of intent to bid with general company information using the form below. The intent to bid should be sent by encrypted email to AmerenIL\_MDI\_RFP@encolorconsulting.com. Notification of the intent to bid should be sent by 4:00 PM Central Time on October 5, 2022. Bidder(s) will receive an email confirmation that their Intent to Bid was received.



## RFP Due Date

Proposals must be submitted electronically and received no later than 4:00 PM Central Time on October 14, 2022. Proposals are to be sent by encrypted email to AmerenIL\_MDI\_RFP@encolorconsulting.com. Bidder(s) will be notified of receipt of their proposal.

## RFP Parameters

* AIC has not committed to any course of action as a result of the issuance of this RFP and/or its receipt of proposal from any Bidder(s) response to it.
* Further, AIC reserves the right to amend or alter this RFP, as appropriate, as well as reject as non-responsive any proposals that do not contain the information requested in this RFP, reject late proposals, reject proposals that are determined from the information submitted to not be in the customers’ interest and negotiate with one or more Bidder(s).
* AIC is not liable for any Bidder(s) costs, including but not limited to any incurred by any person or firm responding to this RFP or participating in any phase of this RFP, and regardless of whether such Bidder costs are incurred by modifications to this RFP or other delays.
* AIC reserves the right to make changes, updates or cancel the RFP. Any updates to or the cancellation of this RFP will be posted at [www.AmerenIllinoisSavings.com/RFP](http://www.AmerenIllinoisSavings.com/RFP). In addition, notification of updates or cancellation will be emailed to Bidder(s) who have registered for the Bidder(s) Conference Call or submitted an Intent to Bid.

## Errors and Omissions

A Bidder that discovers an error or omission in its RFP response package may withdraw that package and resubmit a revised version, provided that it does so before the deadline for submission of the RFP responses.

## RFP Disclosure and Confidentiality Terms

The information contained in this RFP (or accumulated through other written or verbal communication) is strictly confidential. It is for proposal purposes only and is not to be disclosed or used for any other purpose. Information received in response to this RFP will be held in strict confidence and not disclosed to any party, other than Ameren and its agents, without Bidder’s express written consent, except as may be required to comply with Ameren’s regulatory requirements. Information submitted will not be returned to Bidder(s).

## Conflicts and Disclosures

Bidder(s) must provide a list of any potential conflicts and a disclosure of any professional relationships they have with AIC, any of its entities, implementers and contractors currently or previously engaged by AIC. The presence of such relationships is not necessarily disqualifying, however.

## Modification of Request for Proposal

After the assessment and analyses of proposals submitted in response to this RFP are completed, AIC reserves the right to modify the requirements and terms of this RFP. AIC may also, at its sole discretion, request additional information or resubmission of some or all items from some or all of the initial Bidder(s).

## Contract Award

* Following the review of all qualified responses by AIC and ENCOLOR, an independent third party, AIC will notify each Bidder regarding the desire to conduct (or not conduct) further negotiations and/or discussions regarding the applicable proposal(s).
* For avoidance of doubt, this RFP creates no contractual relationship between AIC and Bidder, which is subject to AIC and Bidder coming to agreement with respect to all contract terms and all attachments thereto.

## Project Budget

The estimated budget for the MDI Assessments is $200,000 (approximately $100,000 for each assessment). Bidder(s) are encouraged to propose a scope of work that will meet the objectives of the assessment in the most effective and efficient way and within the allocated budget.

# **MDI Assessment Framework**

## Understanding MDI Assessment Goals

AIC’s goals for the MDI assessment are to:

* Identify ways in which the MDI initiative is performing well and making progress towards achieving overall goals and objectives
* Identify any areas in which there may be room for improvement
* Understand relevant best practices
* Provide actionable recommendations for improvement

## MDI Assessment Methodologies

Bidder(s) are encouraged to review publicly available information about the MDI to inform the design of a creative, impactful Assessment proposal. Bidder(s) have wide latitude in defining a recommended approach. That said, it is assumed that any proposed scope of work will include engagement with AIC MDI leadership, staff, implementers, and stakeholders as well as engagement with community partners and diverse vendors through some combination of:

* Primary and secondary research
* One-on-one and/or small group interviews
* On-line surveys
* Focus groups
* Data analysis/analytics

## Recommendations for MDI Enhancement

The proposed assessment approaches should inform the development of viable, affordable, prioritized process improvements that, when adopted, will enable the MDI, as well as AIC's portfolio of energy efficiency programs, to be as successful and impactful as possible. The following table includes potential research questions that could be explored to advance MDI goals and objectives. These questions are organized into three categories:

* Technology and Financial Optimization
* Customer and Community Impact
* AIC/MDI Organizational Development

|  |  |  |
| --- | --- | --- |
| **Technology & Financial Optimization** | **Customer & Community Impact** | **AIC/MDI Organizational Development** |
| * Gap analysis/Heat Mapping: Assessment of EE measure installation in urban, suburban, and rural communities and strategies for improved market penetration
* New Financial Partnerships: How/where can MDI leverage net-new resources (‘other funding sources) to advance EE measure installations
* EE Measures: Are there new EE measure adoption opportunities and how can we best integrate them?
* Supply Chain Optimization: How can we improve our influence across the EE supply chain?
 | * Partnership Optimization: How can we improve existing MDI partnerships?
* New Partnerships: What new partnerships are available that can accelerate MDI EE, Education, Workforce & Economic Development, and Diversity, Equity, and Inclusion goals in rural, suburban, and urban communities? (e.g., Community Action Agencies, Economic & Workforce Development Agencies, Climate Action organizations, other)
* Marketing: How can MDI improve messaging/ communications?
* Customer Experience: How can we specifically improve MDI customer and partner experiences and journeys
 | * AIC/MDI Staff: What professional development & training opportunities would provide the most benefit to MDI/stakeholder and partners?
* Process Improvements: What improvements can be made to enhance MDI function, impact and customer experience?
* Metrics, Tracking & Reporting: what improvements can be made to existing metrics, tracking, and reporting tools, templates, and content?
* Data, Analytics & Story: How can we improve the quality and usability of data to enhance MDI storytelling enabling enhanced reputation and thought leadership?
 |

# **Vendor Selection**

## Key Considerations

AIC seeks an exceptional strategic and operational business partner that has proven capacity to successfully complete the MDI assessment. The following define the required and desired qualifications and abilities.

## **Required:**

* Proven organizational and staff experience with research, evaluation, strategic planning, effective collaboration, expert program/project management
* Clearly articulated project plan, processes, and outcomes
* Clearly articulated and viable project management plan
* Clearly articulated organizational commitment to Diversity, Equity, and Inclusion and demonstrated track record in advancing DEI in underserved urban, multi-cultural, and rural communities[[3]](#footnote-3)
* Agility with data and analytics and reporting
* Clearly articulated plan to ensure excellent customer and stakeholder experience and effective troubleshooting.

## **Desired**

* Experience working within the utility/energy efficiency/clean energy sector
* Experience conducting research in a way that recognizes and engages diverse customers and stakeholders with different cultural backgrounds and experiences
* Ability to convert research and data analysis into effective storytelling

## Basic Bidder Requirements

Detailed Bidder requirements can be found in the Terms & Conditions included in the RFP attachments (section 5.3). Requirements for the selected bidder include:

* Business: must be a legal entity able to conduct business in Illinois
* On-time: able to complete the project within the proposed timeframe (unless mutually agreed to by AIC and Bidder).
* Budget: able to successfully complete the project within the budget provided in your bid (unless mutually agreed to by AIC and Bidder).
* Confidentiality: able to ensure that information about AIC and/or our customers and partners will be treated as confidential and not to be shared with any individual or organization outside of project Scope of Work.
* Data & System Security: able to maintain the privacy and security 4 of any/all AIC, AIC customer, MDI partner, and program participant data. All data security processes and systems must meet or exceed AIC security requirements as well as the requirements set forth by applicable local, state, and federal law.
* Insurance: maintain adequate insurance coverage
* Safety: maintain a safety plan that ensures staff, stakeholder, and community safety at work and in the field[[4]](#footnote-4)

# **Proposal Structure**

Proposals must include a proposal cover, a cover or transmittal letter, a table of contents, and Bidder contact information. Pages must be numbered and dated. All required attachments included in section 5.3 must be included in the submission.

The submission of a proposal shall constitute the acknowledgement and acceptance of all the terms, conditions, and requirements set forth in this RFP unless exceptions are noted specifically.

## Proposal Outline

A suggested outline for Bidder proposals with recommended page numbers is shown below.

* Executive Summary 1–2 pages
* MDI Assessment Plan 4–5 pages
	+ Description
	+ Methodology
	+ Structure & Schedule
	+ Market Development Actions
	+ Data Analysis Approach
	+ Innovation
* Strategies & Keys to Success 2–3 pages
	+ Stakeholder Communications & Engagement
	+ Assessment Process & Outcomes
	+ Risks & Assumptions
	+ Project Management Plan
* Summary of Qualifications 2–4 pages
	+ Organization & Staff[[5]](#footnote-5)
	+ Project Partners (if applicable)
	+ Project Organizational Chart
	+ Description of Two (2) Relevant Projects that Demonstrate Capabilities[[6]](#footnote-6)
	+ Supplier Diversity[[7]](#footnote-7)
* Project Timeline & Budget[[8]](#footnote-8) 2–4 pages

The proposal should identify and describe any key deliverables and project milestones anticipated by Bidder(s).

## Proposal Evaluation Criteria & Weighting

Each proposal will be evaluated based on the criteria listed in the table below. The estimated weight applied to each criterion is also shown.

|  |  |
| --- | --- |
| **Criterion** | **Weight** |
| Organization & Team Experience & Expertise | 10% |
| Project Assessment Methodology & Plan | 20% |
| Diversity, Equity & Inclusion Commitment & Experience | 20% |
| Project Management & Collaboration Plan | 20% |
| Stakeholder Engagement & Coordination | 15% |
| Budget | 15% |

## Required RFP Attachments

Bidder(s) shall provide their response to the following attachments as part of their proposal submission. Bidder(s) should append the file name to include the Bidder(s) name. For example: “Attachment 1\_Budget\_[Bidder Company Name].doc.”

* **Attachment 1**—Budget Template. Bidder(s) are asked to use this template for developing and presenting the proposed budget.



* **Attachment 2**—Supplier Response Form and Supplier Diversity, Subcontractor Business Plan for Ameren. Please complete both tabs and include any requested attachments (note the name of the attachment in the related field). To the extent that any of the items requested on the Supplier Response Form are addressed in detail in a Bidder(s)’ proposal, Bidder(s) can reference specific pages and sections of their proposal on the form. AIC values diversity and believes in providing equal opportunity to all qualified suppliers, including diverse suppliers (i.e., minority, women, veteran, and disabled veteran owned businesses). As a valued supplier/contractor, AIC is requesting Bidder(s) share in our commitment to provide qualified diverse suppliers an opportunity to participate in this proposal. AIC’s definitions of diversity are included in the tab labeled “Diversity Definitions.” Bidder(s) must complete and include as attachment; failure to do so may subject the bid to disqualification.



* **Attachment 3**—Terms and Conditions. The contract awarded to Bidder as a result of this RFP will be subject to AIC’s Terms and Conditions, which can be modified. Any Bidder exceptions to these terms must be specifically objected to by providing redlined version Attachment 3 of the proposal. Failure to provide exceptions in the proposal response shall be deemed a waiver of Bidder’s right to take exceptions and as an acceptance of all said terms and conditions at time of award. A standard statement of work template is included in the terms and conditions for informational purposes. A statement of work will be developed based on the proposed tasks and budget submitted by the selected Bidder; note that some of the provisions in the statement of work template may not be applicable to this project. Bidder(s) are not asked to provide a redlined version of the statement of work as part of the proposal.



* **Attachment 4**—Market Development Action Plan (MDAP). Bidder(s) should include a MDAP or describe how their proposed assessment approach addresses the key elements described in this attachment.



1. All emails sent to and from ENCOLOR related to this RFP must be encrypted. [↑](#footnote-ref-1)
2. Diverse individuals and communities include the following: members of the Military or Veterans; people of minority or historically underrepresented ethnicity including, but not limited to; African American, Hispanic American, and Asian American, people with physical or mental challenges or disabilities; people who are Gay/Lesbian/Bisexual/Transgender; and females. [↑](#footnote-ref-2)
3. Bidder(s)’ Diversity, Equity, and Inclusion policy can be described in item 9.03 on Suppler Response Questions tab in Attachment 2. [↑](#footnote-ref-3)
4. Bidder(s)’ safety plan can be submitted as described in the Suppler Response Questions tab in Attachment 2 or described in item 4.01 of that tab. [↑](#footnote-ref-4)
5. Resumes for each team member are requested in a separate document. Please see item 8.01 on the Supplier Response Questions tab in Attachment 2. [↑](#footnote-ref-5)
6. Additional project descriptions can be included if relevant. Bidder(s) are asked to provide two (2) client references from these projects. Reference information including each reference’s company name, project summary, and contact information (name, title, phone number, and email) should be listed in item 3.00 of the Supplier Response Questions tab in Attachment 2. [↑](#footnote-ref-6)
7. AIC is committed to increasing opportunities for diverse suppliers. As such, Bidder(s) are encouraged to identify if they (or any subcontractor(s)) are in any of the Diverse Business Enterprise (DBE) categories including Woman Business Enterprise, Service-Disabled Veteran Business Enterprise, Veteran Business Enterprise, Small Business Concern, or Other. Bidders are encouraged to provide certifications, if applicable, and to complete Ameren's Supplier Diversity Registration at <https://www.ameren.com/company/business-partners/suppliers/supplier-diversity>. [↑](#footnote-ref-7)
8. A budget template is provided as Attachment 1. The proposal narrative should include a description of key budget factors considered. [↑](#footnote-ref-8)