

# Request for Proposals

## Assessment of Ameren Illinois Market Development Initiative

**Bidders Conference**  
**September 13, 2022**

# Agenda – MDI Assessment – Bidders Conference

September 13, 2022 | 2:00 to 3:30 pm CDT

- Hello & Welcome 2:00–2:10
  - Introductions
  
- Overview of RFP 2:10–2:30
  - MDI Programs
  - MDI Assessment Objectives
  - Proposal Format
  
- Important Documents 2:30–2:50
  - RFP Attachments
  - Helpful Resources
  
- Bidder Best Practices 2:50–3:00
  
- Questions & Answers | Next Steps 3:00–3:30

# Introductions

## Facilitators



**Angie Ostaszewski**  
Ameren Illinois

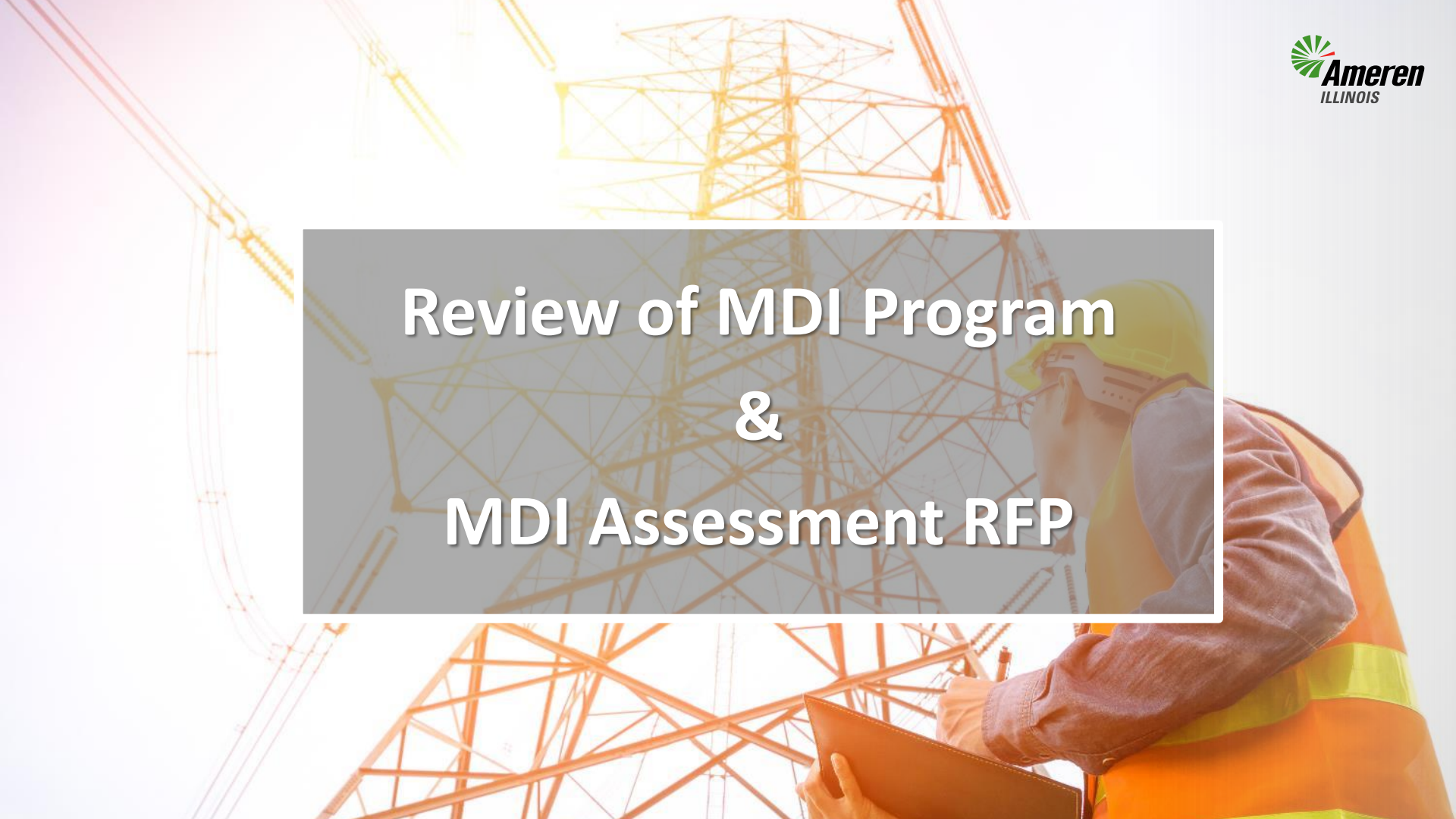


**Jill Steiner**  
Encolor Team  
(Saldo Research)



**Ashley Nicholls**  
Encolor Team  
(Doer/Maker)

## Meeting Participants

The background of the slide is a photograph of a high-voltage power line tower. The tower is a complex lattice structure of metal, painted in a light orange or yellow color. In the foreground, on the right side, a person is visible from the chest up. They are wearing a yellow hard hat, a grey long-sleeved shirt, and a high-visibility orange safety vest with reflective yellow stripes. They are holding a clipboard and looking towards the tower. The overall lighting is bright, suggesting a sunny day.

# Review of MDI Program & MDI Assessment RFP

# MDI | Program Overview



The Market Development Initiative (MDI) is comprised of projects and partnerships all working together to engage Ameren Illinois (AIC) residential and business customers who have not previously benefited from energy efficiency.

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

MDI supports Ameren Illinois' commitment to "Energy Efficiency for All"

**Learn more about Ameren's Market Development Initiative**  
**[AmerenIllinoisSavings.com/MDI](https://AmerenIllinoisSavings.com/MDI)**

## MDI | Program Goals



MDI has three foundational goals:

1. Engage customers who have not previously benefited from energy efficiency
2. Increase number of energy efficiency jobs available to local and diverse candidates
3. Support new or growing, local and diverse businesses through our program

**Learn more about Ameren's Market Development Initiative**  
**[AmerenIllinoisSavings.com/MDI](https://AmerenIllinoisSavings.com/MDI)**

## MDI | Accomplishments



Beginning in 2018, AIC has dedicated over \$2.9 million per year 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

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
- The second assessment will begin in late 2024
- The estimated budget for the MDI Assessments is \$200,000 (approximately \$100,000 for each assessment)



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

# MDI Assessment | Objectives



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 energy efficiency goals and objectives.

Bidders are requested to provide a proposed approach to conducting the assessment.

Bidders have wide latitude in defining a recommended approach to conducting the assessment, but it is expected that it will include engagement of AIC MDI leadership, staff, implementers, stakeholders, 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

# MDI Assessment | Research Questions



The proposed assessment approaches should inform the development of viable process improvements that will enable the MDI to be as successful and impactful as possible. Key research questions and program improvements have been organized into three categories:

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

## Suggested outline for bidder proposals:

- Proposal Outline
- Executive Summary
- MDI Assessment Plan
- Strategies & Keys to Success
- Summary of Qualifications
- Project Workplan, Timeline & Budget
- Completed Attachments

# MDI Assessment | Proposal Scoring



Proposals will be reviewed and evaluated across multiple categories.

The criteria and approximate weighting of the criteria include:

Categories	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%

# MDI Assessment | RFP Timeline



RFP Release Date	September 6, 2022
Bidders Pre-proposal Conference Call	September 13 , 2022
Bidder Questions Deadline	<b>September 19, 2022</b>
Responses to Questions Issued	September 26, 2022
Intent to Bid Due	<b>September 28, 2022</b>
Bidder Proposal Submission Due	<b>October 7, 2022</b>
Proposal Review & Bidder Selection*	October–November, 2022
Notification of Bid Selection(s)*	November, 2022

\* Estimated dates, subject to change.

## MDI Assessment | Bidder Communications



The RFP, responses to questions, and any other helpful information will be posted on the dedicated landing site:

[www.AmerenIllinoisSavings.com/RFP](http://www.AmerenIllinoisSavings.com/RFP)

Questions, intent to bid, and proposals must be sent by encrypted email to:

[AmerenIL\\_MDI\\_RFP@encolorconsulting.com](mailto:AmerenIL_MDI_RFP@encolorconsulting.com)





# Important Documents

# MDI Assessment | Intent to Bid



## Intent to Bid and General Company Information Form

### ▲ Submit this form by September 28, 2022

By submitting this form, the company listed below is stating its intent to submit a proposal in response to the request for proposals to conduct assessments of Ameren Illinois' Market Development Initiative.



Company Information	
Company Name:	
Street Address:	
City:	
State:	
Telephone:	
Website:	
Bidder office location for this project:	
Contact Information	
Primary Contact Name:	
Primary Contact Title/Position:	
Primary Telephone:	
Primary Email:	
Primary Address:	
Alternate Contact Information	
Alternate Contact Name:	
Alternate Contact Title/Position:	
Alternate Contact Telephone:	
Alternate Contact Email:	
Alternate Contact Address:	

- Bidders are strongly encouraged to submit an Intent to Bid by September 28, 2022, by sending via encrypted email to:  
[AmerenIL\\_MDI\\_RFP@encolorconsulting.com](mailto:AmerenIL_MDI_RFP@encolorconsulting.com)
- Form is available in Section 2.4 of the RFP
- Submission of the Intent to Bid is non-binding
- Bidders that submit the Intent to Bid will receive all updates and information related to the RFP

# MDI Assessment | RFP Proposal Attachments



## Attachment 1. Budget Template

- Use this template for developing and presenting the proposed budget

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R
		Hourly Rate	Task 1	Task 2	Task 3	Task 4	Task 5	Task 6	Task 7	Task 8	Task 9	Task 10	Total Hours by Staff Member	Total Cost by Staff Member				
2																		
3	Staff 1		1	1	1	1	1	1	1	1	1	1	10	\$0				
4	Staff 2												0	\$0				
5	Staff 3												0	\$0				
6	Staff 4												0	\$0				
7	Staff 5												0	\$0				
8	Staff 6												0	\$0				
9	Staff 7												0	\$0				
10	Total Hours by Task		1	1	1	1	1	1	1	1	1	1	1	\$0				
11	Total Labor Cost		\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0				
12	Blended Hourly Rate		\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0				
13	Direct Costs																	
14	Total Cost (Labor and Direct)		\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0		\$0				
15																		
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- Specify tasks within your proposal
- Estimate the time that each staff person will spend on the task
- Embedded formulas will calculate total by task, staff person, and overall
- To distinguish between 2022 and 2024 assessments, specify by task or create separate tabs for each assessment

Label each task. If there are more than 10 tasks, insert additional columns before Task 10 and label accordingly.

List each staff member in column A and include their hourly rate in column B. If there are more than 7 staff members, insert additional rows before Staff 7

Include direct costs associated with each task. Direct costs may include travel; incentives for surveys, interviews, or focus groups; purchase of materials; or other planned expenses.

Enter the planned hours for each staff member for the completion of each task.

Calculated cells. Please do not change these cells.

Labor cost QC check. These fields should be equal.

This field represents the total proposed budget.

## Attachment 2. Supplier Response Form and Supplier Diversity, Subcontractor Business Plan for Ameren

### Supplier Response Form

- General Information
- Company Background
- References
- Quality and Safety Provisions
- Financials
- Project Staffing
- Project Management
- Sustainability
- Supplier Diversity

### Supplier Diversity, Subcontractor Business Plan for Ameren

- Percentage of Proposed Cost to Diverse Suppliers

**Note: Please list all diverse and non-diverse subcontractors on supplier/subcontractor business plan. Ameren will require bidders to track spend amounts when subcontracts are awarded to Diverse Suppliers. If bidder is unable to award to Diverse Supplier indicate name of diverse supplier contacted and reason(s) why bidder was unable to award.**

Please specify in the cell below the % diverse supplier participation as part of the bid

% of Diverse Supplier Participation:		-			
Name of Supplier/Subcontractor	Email	Business Classification of Diverse Subcontractor (Select from the Pull Down)	Type of Work/Services to be Provided by Subcontractor	Anticipated Value of Work (%) to be Performed	Reason(s) why unable to award to Diverse Subcontractor (Select from the Pull Down)

Supplier Response Questions | **Supplier Diversity Plan** | Diversity Definitions | ⊕

Complete both tabs



For reference

## Attachment 3: Terms and Conditions

- The contract awarded as a result of this RFP will be subject to AIC's Terms and Conditions
  - Bidders can propose modifications to the terms and conditions for consideration by AIC—any proposed modifications to the terms and conditions made by the selected bidder will be addressed in the contracting process
  - Any proposed modifications to the terms and conditions should be submitted **with the proposal**
- A standard **statement of work template** is included in the Terms and Conditions *for informational purposes only*; a statement of work will be developed *by the selected Bidder* in conjunction with AIC

## Attachment 4. Market Development Action Plan (MDAP)

Bidder(s) should include a MDAP or describe how their assessment approach addresses the key elements described in Attachment 4.

- Demonstrate innovative strategies to support Ameren Illinois' efforts to achieve its MDI objectives:
  - Engage underserved customers
  - Build a diverse workforce
  - Support diverse businesses
- Consider opportunities for partnering with diverse business enterprises and local, non-profit, and community-based organizations.

# MDI Assessment | RFP Proposal Attachments

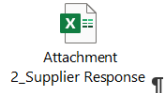
## 5.3 Required RFP Attachments

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

Double-click each icon to open attachments

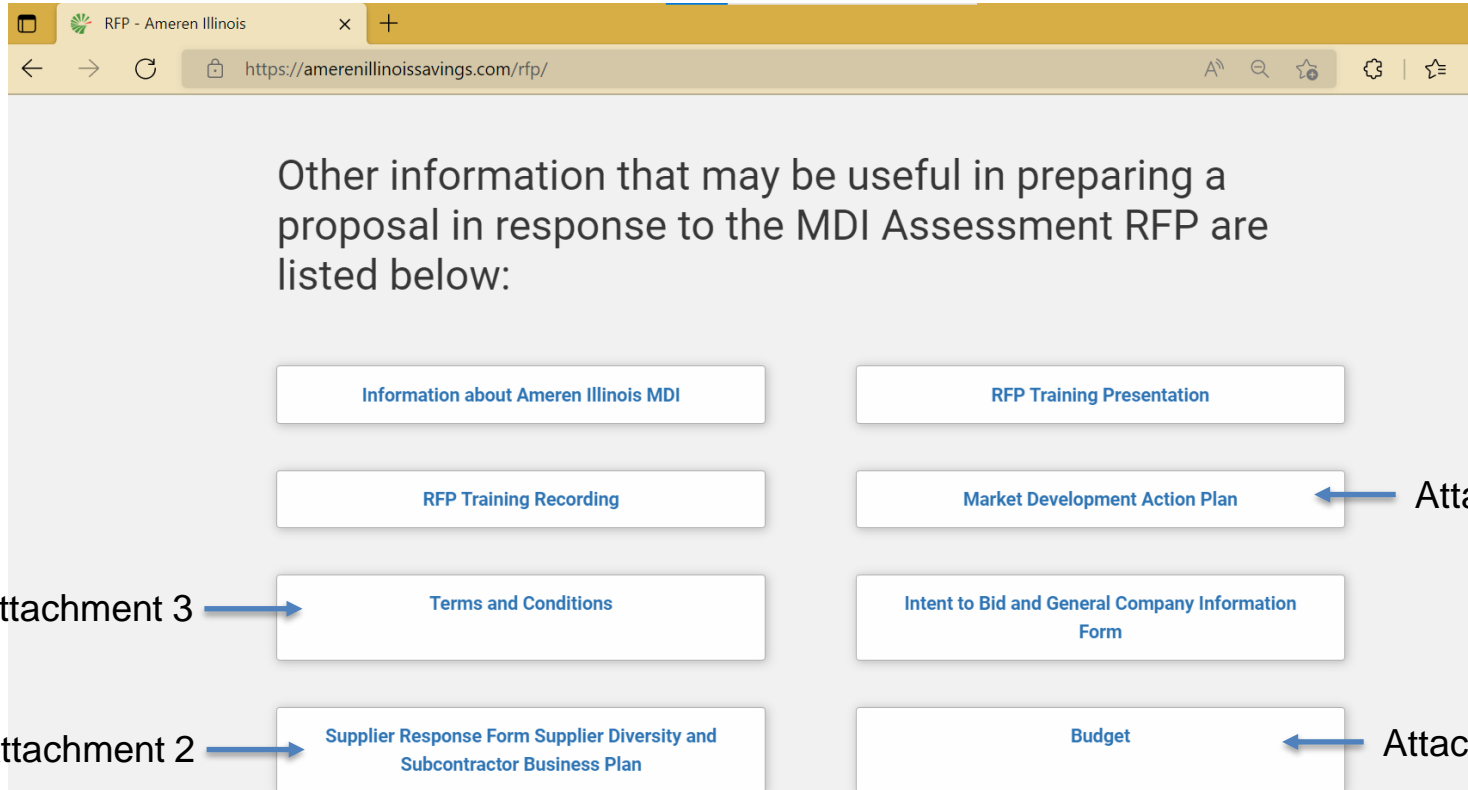
Attachments 1 and 2 must be completed and included with the proposal

Attachment 3 must be included if the Bidder wishes to propose modifications to the terms and conditions

Attachment 4 (MDAP) can be attached as a separate document or included in the proposal narrative

# MDI Assessment | RFP Proposal Attachments

RFP Proposal Attachments are also on the RFP page



Other information that may be useful in preparing a proposal in response to the MDI Assessment RFP are listed below:

Information about Ameren Illinois MDI	RFP Training Presentation
RFP Training Recording	Market Development Action Plan ← Attachment 4
Attachment 3 → Terms and Conditions	Intent to Bid and General Company Information Form
Attachment 2 → Supplier Response Form Supplier Diversity and Subcontractor Business Plan	Budget ← Attachment 1



- [AIC's 2022-2025 Plan](#)
- [Illinois Energy Efficiency Policy Manual \(Version 2\)](#)
- [AIC's Settlement Stipulation and Agreement](#)
- [2020 Energy Efficiency Ideas - Illinois Energy Efficiency Stakeholder Advisory Group](#)
- [Information about the Market Development Initiative](#)

A photograph of an electrician in a yellow hard hat and orange safety vest, holding a clipboard and looking at a large electrical transmission tower. The scene is set against a bright, hazy sky, with the tower's metal lattice structure dominating the background.

# Bidder Best Practices

## Do Your Homework

- Read the RFP & all related documents
- Understand the organization and goals and objectives the issuer of the RFP is trying to accomplish
- Pay attention to details and ensure all proposal and/or bidder requirements are met
- Conduct a quality assurance review—the quality of a proposal will be an indicator of the quality of work of a bidder

## Ask Questions Internally

- Is this worth going after?
- Do you have the resources to respond well & on-time?
- Is this project financially viable for your organization? Does the pricing match the budget?
- Is this the right work for your organization?
- Do you have an existing or prior relationship with the issuing organization?
- Have you done this type of work before?
- Should you consider teaming and with which strategic partners?

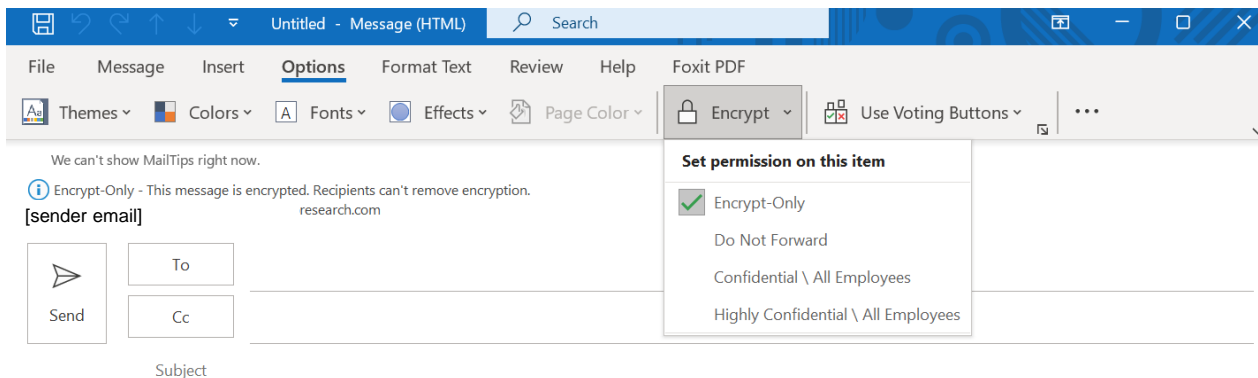
## Develop a Process

- Identify your win themes – Why should they hire you? What make you uniquely qualified to do this work?
- Develop a proposal template - Go through the RFP carefully to identify every question that you need to answer. Add it to your template.
- Assign responsibilities and due dates – What needs to be done first? Who is ultimately accountable for ensuring the bid gets submitted on time? Who is responsible for signing off on the scope and budget?
- Draft-to-Final Proposal Development
  - Fresh-eyes Review
  - Proof & Copy Editing

- If you are a diverse supplier, register in the utilities' supplier diversity program
  - [Supplier Diversity | Ameren - Ameren.com](https://www.ameren.com/supplier-diversity)
- Consider getting 3rd party certified
  - Certification can help open doors for diverse suppliers to be invited to new opportunities with potentially larger scopes

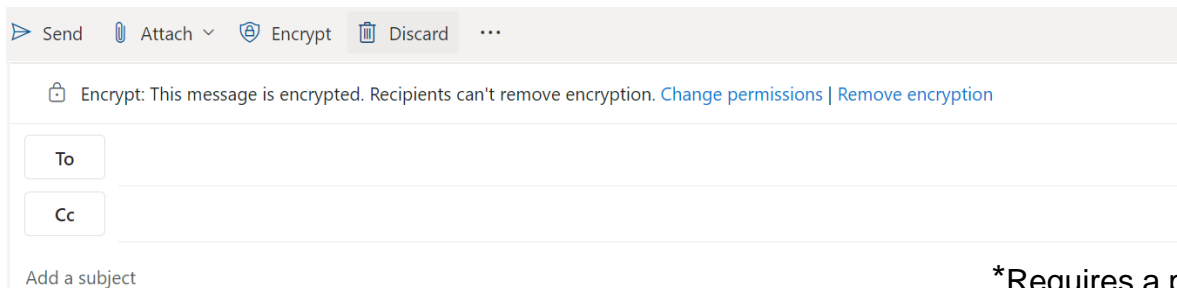
# MDI Assessment RFP | Outlook\* Encryption

## In the Microsoft Outlook Desktop



- Open a new message
- Click Options
- Click Encrypt
- Select Encrypt-Only

## In the Microsoft Web App



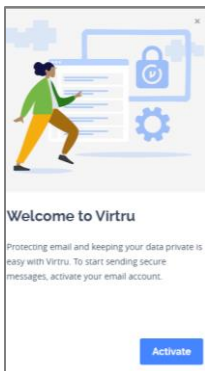
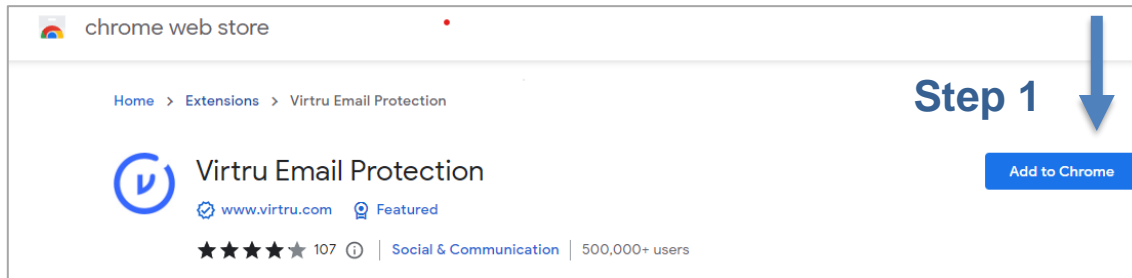
- Open a new message
- Click Encrypt

\*Requires a paid Microsoft Office or 365 subscription

# MDI Assessment RFP | Gmail Encryption

S/MIME encryption can be enabled on the Google Admin Console by an administrator

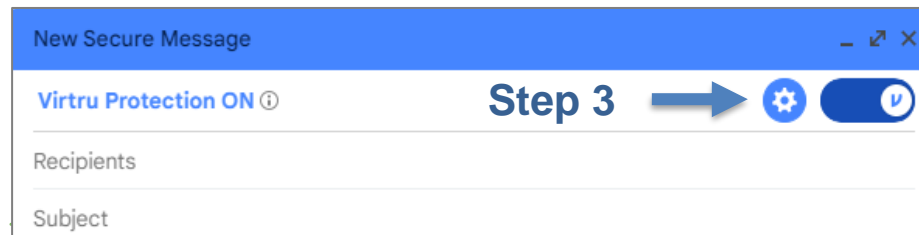
Gmail users can enable encryption by downloading the [Virtru](#) extension for Google Chrome



Log into Gmail after adding the Virtru extension and activate Virtru

← **Step 2**

In a new message, the option to turn on encryption (Virtru Protection will appear at the top of the message







**Questions?  
Next Steps**

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**Energy Efficiency**  
PROGRAM

***AmerenIllinoisSavings.com***