

A utility worker wearing a bright yellow-green hard hat with the Ameren logo, safety glasses, a high-visibility yellow-green vest over a tan long-sleeved shirt, and work gloves. He is holding a pair of pliers and looking off to the side. The background shows a blurred industrial setting with power lines and another worker in the distance.

**Request for Proposals (RFP)
Technical Workshop**

Agenda – Virtual Technical Workshop

August 2022



- **Introductions + Welcome**
- **Workshop**
 - Discuss the procurement process
 - Review important documents
 - Learn best practices
 - Review an upcoming opportunity

Introductions



**Quinn Parker, CEO
ENCOLOR**



**Ashley Nicholls, CEO
Doer/Maker**

A photograph of a utility worker in a yellow hard hat and orange safety vest, holding a clipboard and looking towards a large electrical transmission tower. The scene is set against a bright, hazy sky, with the tower's metal lattice structure dominating the background. A semi-transparent grey box with a white border is overlaid on the center of the image, containing the text "The Procurement Process".

The Procurement Process

The Process



- **The procurement process could look different. It could be an:**
 - Request For Qualifications or Quotes
 - Request For Information
 - Request For Proposals

The Process

What is the difference?

RFQ

- **Request for Qualifications** — This is usually a pre-qualification process. Those that meet the qualification criteria are usually included in a subsequent RFP process.
- **Request for Quotes** — This is usually used when an organization already has a clear scope of work and is only looking for vendor costs, payment terms and product details.

RFI

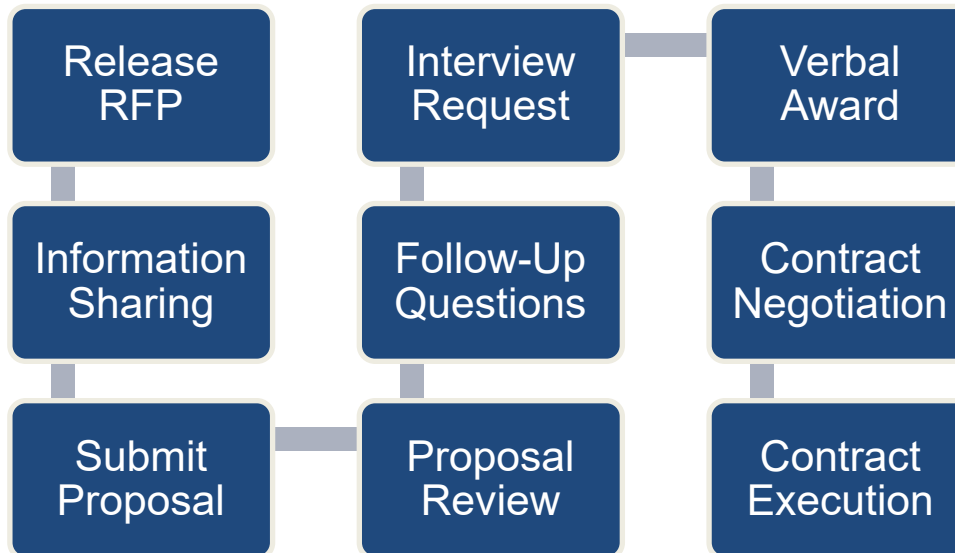
- **Request for Information** — This is used when the organization is missing information on the product or service. Organizations are usually looking for clarity on the price, delivery, capabilities and market interest. A RFQ or RFP usually follows an RFI.

RFP

- **Request for Proposals** - This should clearly communicate the organization's needs and requests proposals to address those needs.

The Process

What are the steps?



An RFP process is usually **two to eight** weeks long depending on the complexity of the solicitation.

A semi-transparent grey rectangular box with a white border, containing the text "Document Review" in a white, bold, sans-serif font. The background of the entire image is a low-angle shot of a power transmission tower with power lines, overlaid with a warm, orange-yellow light gradient.

Document Review

Document Review

What is usually included in the RFP documents?

- **In an RFP, organizations usually include the following standard documents:**
 - Scope of Work (SOW)
 - Terms and Conditions (T&Cs)
 - Supplier Diversity Requirements
 - Supplier Questionnaires
 - MDAP – specific to Ameren IL
 - Proposal review criteria

Document Review

Scope of Work (SOW)

- **The SOW is a detailed description of what the organization is looking for.**
- **This is where you show your innovation and experience in delivering on this type of work. This includes:**
 - Approach
 - Methodology
 - Staffing
 - Budget

There are some cases where the RFP will not include a scope of work and the bidders are expected to develop the scope based on the desired outcomes.

Document Review

Terms and Conditions

- **The T&Cs outlines clearly the legal obligation each party has to each other. It usually includes several clauses that you should read very carefully, especially:**
 - Insurance Requirements
 - Indemnity Clauses
 - Intellectual Property
 - Payment Terms
 - Non-compete clauses



Document Review

IT and Supplier Diversity



- **Organizations are starting to include an IT and Supplier Diversity Questionnaire.**
 - **IT** - This is to better understand your current IT/Network Security. **It impacts Cybersecurity requirements.**
 - **Supplier Diversity** — Organizations what to understand the make up of your company. Are you a diverse business? Are you certified? What internal processes do you have in place to promote Diversity, Equity and Inclusion?
 - **Supplier Quality** — Concepts like quality planning, quality assurance, quality control, and quality improvement, typically addressed in a supplier's quality management plan (QMP)

Ameren Illinois is committed to serving the diverse needs of our communities and aims to successfully integrate our commitment into the corporation's business strategy.

Document Review

Market Development Action Plan (Ameren IL specific)

- **Ameren is committed to incorporate the principles of their Market Development Initiative into everything they do.**
- **The MDAP requires potential vendors to communicate how they would weave these principles into the delivery of their products and services.**

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



Best Practices

Best Practices

- **Do your homework**
- **Ask questions**
- **Develop and document your process**
- **Answer all of the questions asked**
- **Understand and address the proposal review criteria**

Best Practices

Do your homework

- **Read the RFP**
 - **And the appendix and supplemental documents!!!!**
- **Do some research**
 - Understand the organization and their challenges.
 - Understand the ecosystem. Who else can do this work? Who else is working with the organization?
 - What are the risks?
- **Review with the delivery team**
 - Share the proposal and your research with the team.

Best Practices

Ask questions



Internally ask questions, can you really deliver on this SOW?

- *Is this worth going after?*
- *Do you have the resources to respond well?*
- *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?*
- *Can you meet the submission deadline?*
- *Should you consider teaming?*

Ask questions during the Q&A period and during the Bidders' conference.

Best Practices

Develop a process

- Develop a process workflow. Key steps are:
 - **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?
 - **Consider quality management language** – How are you building safeguards, controls and assurance into your process? How can you demonstrate this thoughtfulness and strategic process to the purchasing organization? How will this process be replicated across all the work you are doing?



Consider developing a proposal schedule template that you can use for every proposal.

Best Practices

Answer the questions being asked.

- **Create the first draft**

- **Answer all the questions asked** – This first draft will likely be messy, ideally with more content than you need
- Try not to recreate the wheel – Use any boilerplate language you have that is appropriate. Such as your organizations history, mission and vision, qualifications, etc.

- **Fresh eyes review**

- Have someone **not** involved with writing the first draft review to identify any gaps
- Also this review will help identify any unwritten assumptions in your proposal

- **Subcontractors**

- If you have subcontractors provide as much information as possible so they can budget appropriately

- **Proof and copy edit**

- Add visuals that add value not just taking up space
- Proof your document. Fix grammar errors and make sure you updated all language especially if you are reusing content

Other considerations



- **If you are a diverse supplier, register in the utility supplier diversity program**
 - [Supplier Diversity | Ameren - Ameren.com](#)
- **Seek partners**
 - Attend networking events to find partners that can help you deliver on larger projects. Or look for a skillset that you currently do not have, but is required to bid on the work that you are interested in.
- **Consider getting 3rd party certified**
 - Certification can help open doors for diverse suppliers to be invited to new opportunities with potentially larger scopes.



Energy Efficiency
PROGRAM

AmerenIllinoisSavings.com