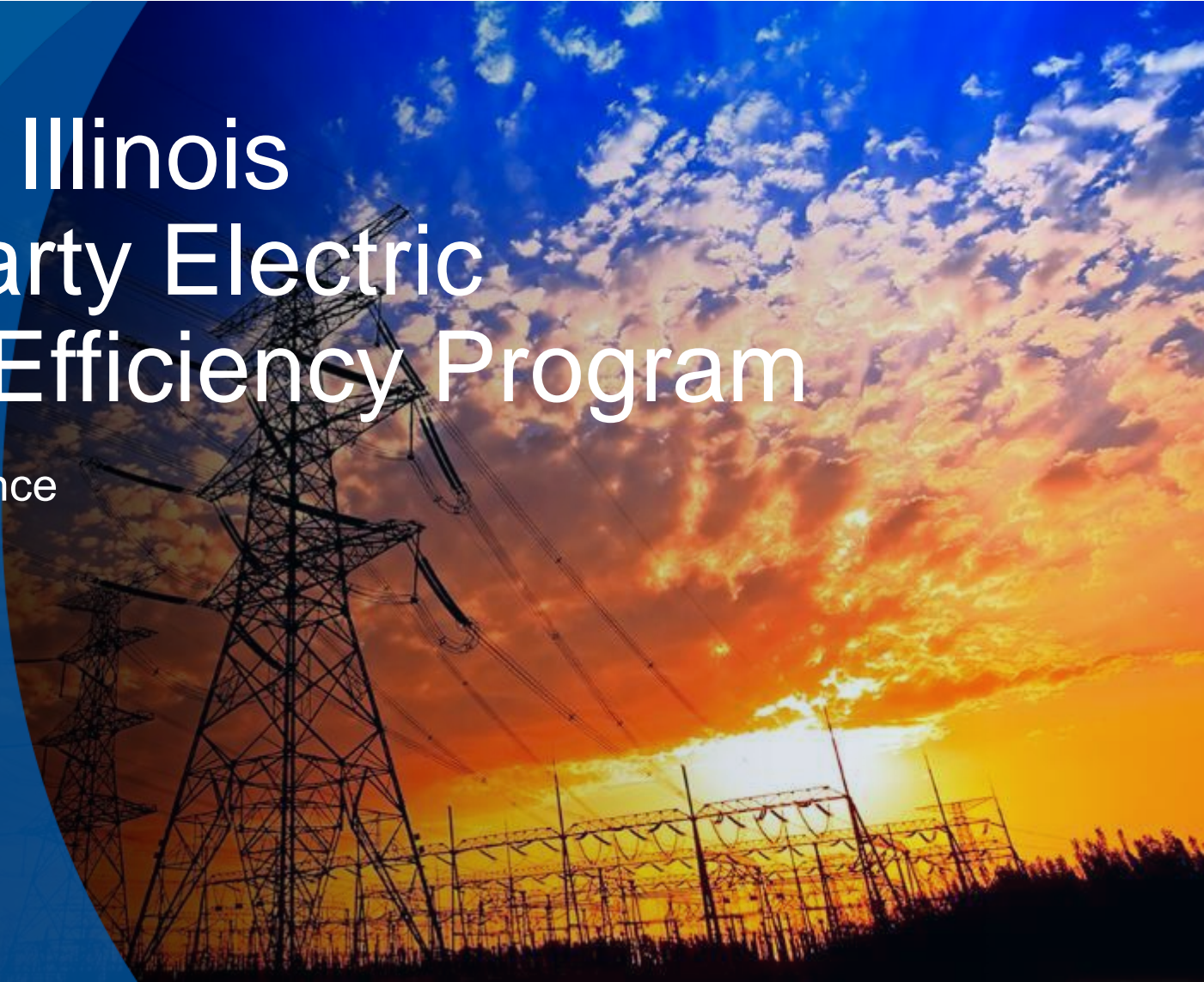


# CADMUS

## Ameren Illinois Third-Party Electric Energy Efficiency Program

Bidders' Conference

September 14, 2021



# Agenda

Timeline

RFP Organization

Initiative Overview

Scoring

Questions

# Timeline

|                                   |                             |
|-----------------------------------|-----------------------------|
| RFP Release Date                  | September 7, 2021           |
| Pre-Bid Bidders' Conference Call  | September 14 , 2021         |
| Bidder Questions Deadline         | <b>September 20, 2021</b>   |
| Responses to Questions Issued     | September 24, 2021          |
| Intent to Bid Due                 | <b>September 28, 2021</b>   |
| Bidder Proposal(s) Submission Due | <b>October 15, 2021</b>     |
| Proposal Review*                  | October 15–December 1, 2021 |
| Notification of Bid Selection(s)* | December 1, 2021            |

\* Estimated dates, subject to change.

Questions, intent to bid, and proposals must be sent to:  
[AICBidReview2021@cadmusgroup.com](mailto:AICBidReview2021@cadmusgroup.com)

# RFP Organization

- Main Document
  - Introduction and Summary
  - Initiative and Bidding Guidelines
  - Solicitation Process and Requirements
  - Proposal Requirements
- Exhibits
- Appendices
  - A: Initiative Descriptions
  - B: Diversity Definitions
  - C: RFP Resources
    - List of companies interested in partnering or subcontracting

# RFP Sections

## 1. Introduction and Summary

- Provides an overview of the third-party RFP process, description of Ameren Illinois' service territory and energy-efficiency program history, summary of the RFP, and identification of the initiatives for which proposals are sought

## 2. Initiative and Bidding Guidelines

- Provides budgets and savings targets for the initiatives, considerations for bidders, and the expected roles and responsibilities of bidders selected to implement initiatives

## 3. Solicitation Process and Requirements

- Includes RFP schedule, process and schedule for submitting questions, requirements to submit an intent to bid, and submission instructions

## 4. Proposal Requirements

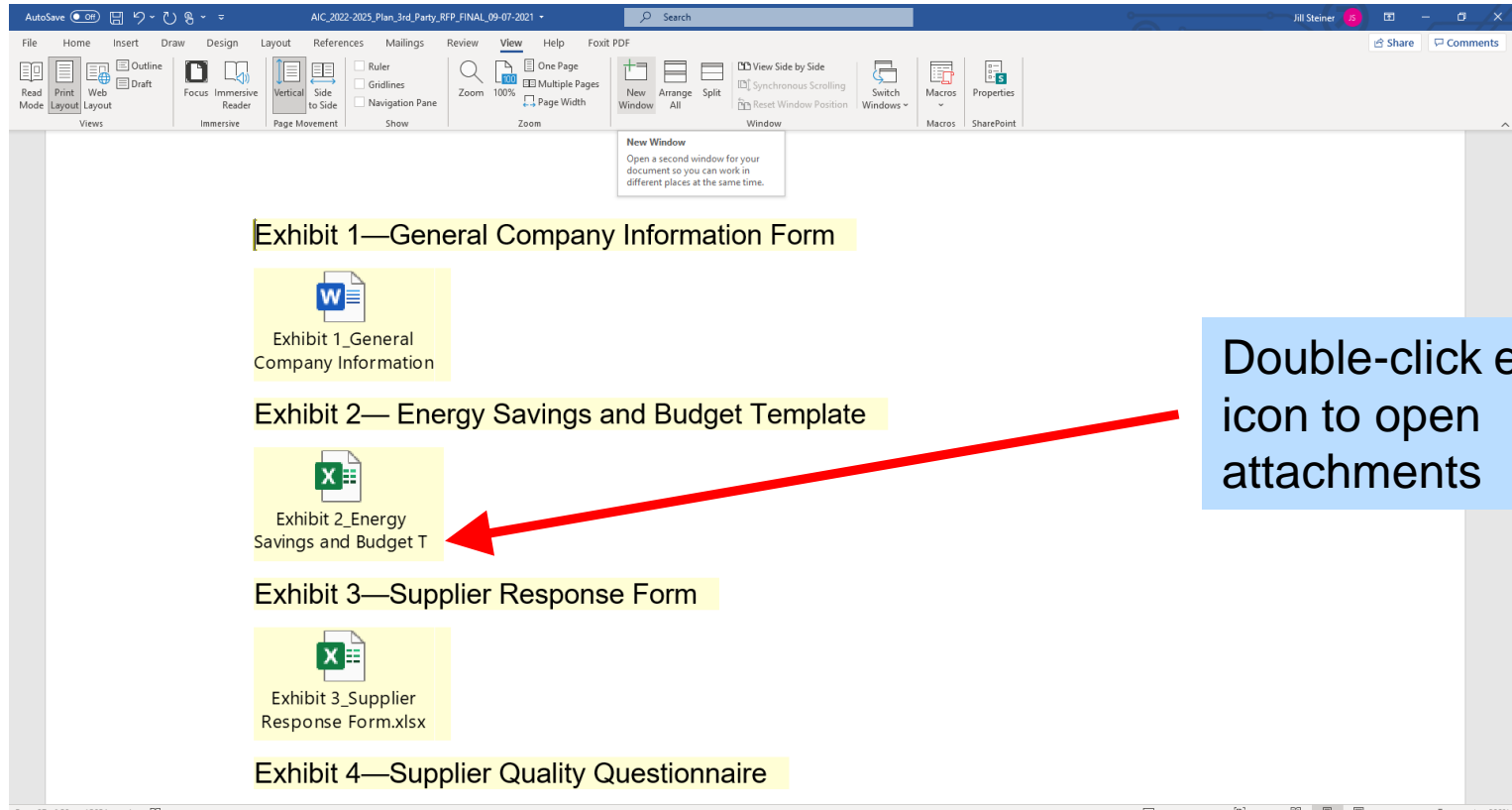
- Describes the proposal format and required elements, including the forms and templates for proposal development and submission

## 5. Exhibits

# Exhibits

- **Exhibit 1**—General Company Information Form (submitted with intent to bid)
- **Exhibit 2**—Energy Savings and Budget Template
- **Exhibit 3**—Supplier Response Form
- **Exhibit 4**—Quality Questionnaire
- **Exhibit 5**—Market Development Action Plan (MDAP)
- **Exhibit 6**—Energy Efficiency Program Services Agreement Terms and Conditions
- **Exhibit 7**—Statement of Work
- **Exhibit 8**—Digital Questionnaire
- **Exhibit 9**—Program Template
- **Exhibit 10**—Supplier Diversity and Subcontractor Business Plan

# Exhibits



All exhibits must be completed and included with the proposal. File name should be:  
**Exhibit #\_Bidder Name\_Initiative Name.doc or .xls**

# Initiative Overview

| Residential   | Business   | Breakthrough Equipment and Devices   |
|---|--|--|
| <ul style="list-style-type: none"><li>• Midstream HVAC*</li><li>• School Kits</li><li>• Income Qualified Community Kits</li><li>• Income Qualified Smart Savers</li></ul> | <ul style="list-style-type: none"><li>• Midstream HVAC*</li><li>• Midstream Lighting</li></ul> | <ul style="list-style-type: none"><li>• Manufactured Home Weatherization and Air Sealing</li><li>• One Stop Shop for Homeless Facilities</li><li>• Smart Home Engagement</li><li>• Advanced Thermostats with Hourly Pricing</li><li>• New and Innovative Initiatives</li></ul> |

\* Proposals for Midstream HVAC must include both Residential and Business components



# Initiative Overview

- Initiative descriptions that include initiative purpose, description, target markets, selection criteria, anticipated measures and any special considerations are provided in Appendix A
  - Initiative descriptions are intended to support Bidders, but not limit their innovation or creativity
- Annual budgets and savings targets for defined initiatives are provided to Bidders as threshold values—*bidders can exceed savings targets or propose lower budgets*
- Bidders can propose on more than one initiative
- Residential and Business Midstream HVAC must be bid together, but separate budgets and savings are provided
- Natural gas budgets and savings, as shown in the RFP, may be used for initiatives that will have dual-fuel impacts, at the discretion of AIC

# Initiative Budgets and Savings

| Initiative                               | Budget              |                     |                     |                     | Annual Electric Savings (MWh) |               |               |               | Average Investment/<br>Annual kWh Savings |
|--|---------------------|---------------------|---------------------|---------------------|-------------------------------|---------------|---------------|---------------|---|
|  | 2022                | 2023                | 2024                | 2025                | 2022                          | 2023          | 2024          | 2025          |   |
| Midstream HVAC (Res)                     | \$833,861           | \$1,557,084         | \$2,080,568         | \$3,065,162         | 1,302                         | 2,519         | 3,834         | 6,379         | \$0.537                                   |
| School Kits                              | \$870,397           | \$870,397           | \$870,397           | \$870,397           | 2,017                         | 2,180         | 2,318         | 2,318         | \$0.394                                   |
| Community Kits                           | \$576,504           | \$576,504           | \$576,504           | \$576,504           | 1,096                         | 1,124         | 1,145         | 1,145         | \$0.511                                   |
| Smart Savers                             | \$1,685,427         | \$1,674,194         | \$1,662,944         | \$1,651,711         | 5,075                         | 5,019         | 4,962         | 4,906         | \$0.334                                   |
| Midstream Lighting (Bus)                 | \$3,205,339         | \$3,067,690         | \$3,062,572         | \$3,185,272         | 20,547                        | 19,665        | 19,632        | 20,418        | \$0.156                                   |
| Midstream HVAC (Bus)                     | \$808,032           | \$2,156,678         | \$2,564,918         | \$3,030,278         | 525                           | 1,039         | 1,179         | 1,340         | \$2.096                                   |
| MH Wz and Air Sealing                    | \$1,089,673         | \$1,089,673         | \$1,089,673         | \$1,089,673         | 996                           | 996           | 996           | 996           | \$1.094                                   |
| OSS for Homeless Facilities              | \$30,000            | \$30,000            | \$20,000            | \$20,000            | 342                           | 342           | 228           | 228           | \$0.088                                   |
| Smart Home Engagement                    | \$199,692           | \$399,383           | \$599,075           | \$798,766           | 201                           | 402           | 604           | 805           | \$0.993                                   |
| Advanced Thermostats with Hourly Pricing | \$57,500            | \$57,500            | \$57,500            | \$57,500            | 112                           | 112           | 112           | 112           | \$0.513                                   |
| New and Innovative Initiatives           | \$1,214,021         | \$614,947           | \$225,563           | \$0                 | 4,047                         | 2,050         | 752           | 0             | \$0.300                                   |
| <b>Total</b>                             | <b>\$10,570,446</b> | <b>\$12,094,050</b> | <b>\$12,809,714</b> | <b>\$14,345,263</b> | <b>36,260</b>                 | <b>35,448</b> | <b>35,762</b> | <b>38,647</b> | <b>\$0.341</b>                            |

Exhibit 2 includes measure assumptions to determine annual savings targets using current TRM and NTG values; Bidders can propose alternative measures that support sustained savings

# Proposal Evaluation

## Screening

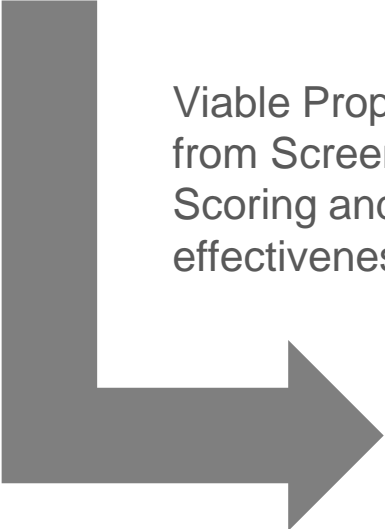
- Completeness
- Synergy
- Historical Performance

## Scoring

- High
- Accurate and Reasonable Savings
  - Reasonable Pricing
  - Market Development Plans
  - Diversity

- Medium
- Accurate Pricing
  - Customer Experience
  - Experience and Staffing
  - Quality Assurance and Control
  - Risk Management

- Low
- Staff Management
  - Systems Capabilities
  - Reporting and Coordination



Viable Proposals Move  
from Screening to  
Scoring and Cost-  
effectiveness Analysis

## Cost-effectiveness

- Total Resource Cost Benefit/Cost Ratio
- Cost per first-year savings
- Cost per lifetime savings

# Additional Considerations

- AIC is committed to increasing opportunities for diverse suppliers and encourages diverse suppliers to submit proposals
- AIC seeks proposals that:
  - Include new and innovative program concepts and cost-effective measures
  - Identify opportunities for partnering with diverse business enterprises and non-profit and community-based organizations to:
    - Engage underserved customers
    - Build a diverse workforce
    - Support diverse businesses
  - Support company objectives including cumulative persistent savings goals as required by the Future Energy Jobs Act (FEJA)

# Useful Resources

- RFP includes links to:
  - [AIC's 2022-2025 Plan](#)
  - [Illinois Energy Efficiency Policy Manual \(Version 2\)](#)
  - [Technical Reference Manual \(TRM\)](#)
  - [2021 NTG Recommendations](#)
  - [AIC's Settlement Stipulation and Agreement](#)
  - [2020 Energy Efficiency Ideas - Illinois Energy Efficiency Stakeholder Advisory Group](#)



# Questions and Discussion

# CADMUS

A blue-tinted photograph of a business meeting. Several people in professional attire are silhouetted against a large window with horizontal blinds. Some are seated at a table, while others stand and talk. A large, semi-transparent blue circular graphic is overlaid on the left side of the image.

Thank You