Request for Proposals

Third-Party Energy Efficiency Program

For Ameren Illinois Customers

Implementation Period January 1, 2026 – December 31, 2029

Issued By:



**Issued:**

**April 16, 2025**

**Proposals Due:**

**May 20, 2025 5:00 PM**

**(Central Time)**

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**Request for Proposals (RFP)**

Third-Party Energy Efficiency Program

**Implementation Period:**

**January 1, 2026 – December 31, 2029**

# Introduction and Summary

## Introduction

Ameren Illinois Company (“AIC”) issues this Request for Proposal (“RFP”) pursuant to Sections 8-103B of the Illinois Public Utilities Act, 220 ILCS 5/8-103B et seq. (the “Act”) and the document filed with the Illinois Commerce Commission in ICC Docket No. 25-0211[[1]](#footnote-2). Pursuant to Illinois law, Illinois electric utilities conduct a solicitation process for purposes of requesting proposals for a third-party energy efficiency program, which will include select measures and/or initiatives[[2]](#footnote-3) as described herein, to be offered during the years commencing (as applicable per the Budget and Savings Tables in Section 2.1 of this RFP) in January 1, 2026, January 1, 2027, January 1, 2028 and January 1, 2029 as part of the Plan.

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, Ill.

The AIC service territory spans 43,700 square miles across the lower three-quarters of Illinois. AIC serves approximately 1.2 million electric and 816,000 natural gas customers across 1,200 communities. AIC's delivery system includes about 4,500 miles of electric transmission lines, 46,000 miles of distribution lines, 18,200 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 at [www.AmerenIllinoisSavings.com](http://www.AmerenIllinoisSavings.com).

In furtherance of Section 5/8-103B(g)(4) of the Act, Cadmus, an independent third party, will work with AIC to coordinate the RFP process.

The main contact for Bidder(s) is:

Josh Lind Associate, Cadmus

[Aic.BidReview2026-2029@cadmusgroup.com](mailto:Aic.BidReview2026-2029@cadmusgroup.com)

The following is a summary of this RFP. Details and instructions follow this Section. Bidder(s) should carefully review these guidelines and seek guidance or clarification, as appropriate.

* Bidder(s) should propose Bids only for the electric and gas energy efficiency initiatives from AIC’s 2026-2029 Plan that are described herein. Notwithstanding the foregoing, Bidders may propose new and innovative proposals for initiatives that are not specified in the Plan or this RFP which are based on realistic market analysis and do not duplicate, compete with, or replace the other existing AIC initiatives identified for the 2026-2029 implementation period (the initiatives which have been filed with the Commission in AIC’s 2026-2029 Plan[[3]](#footnote-4)). Cadmus, an independent third party will review and evaluate the proposed Bids in accordance with the criteria set forth in this RFP, score the proposals received, and rank them according to their cost per lifetime kilowatt-hours saved and other identified criteria, as well as assemble the third-party initiative(s) to be recommended to AIC for selection. The recommended Bidder proposals can only include those that meet all qualifications described in this RFP within Exhibit 3. However, notwithstanding Cadmus’ Bidder proposal recommendations, AIC reserves the right to make the final decisions regarding Bidder selection and contracting.
* Cadmus will also conduct an assessment of the proposals, in part, based on an analysis of cost-effectiveness. Bidder(s) are not expected to provide to Ameren Illinois their cost-effectiveness analysis on the Bids, but they must provide the inputs necessary for the analysis to be performed as part of the selection process. On a bundled basis, measure(s) within each initiative must at least pass the total resource cost (“TRC”) test with a benefit cost ratio greater than or equal to 1.0, as calculated in a manner consistent with the criteria established by the Act.[[4]](#footnote-5) Please note that measures offered to low-income customers[[5]](#footnote-6) are not required to have a TRC>1.0, but comparative cost-effectiveness between proposals, even for low-income program proposals, may be considered in making decisions.
* The purpose of this RFP is to procure energy efficiency measure(s) that acquire cost-effective achievable net electric savings in accordance with Section 8-103B(g)(4) of the Act, and gas savings under the Plan, as applicable.  To the extent proposals capture incremental gas savings, bidders should report such savings, which will be included in TRC test calculations.
* By responding to this RFP, Bidder(s) agree that they will treat as confidential any information marked as confidential by AIC and provided in connection with this RFP, and that Bidder(s) will only use information marked confidential for the sole purpose of preparing a proposal in response to this RFP.
* By responding to this RFP, Bidder(s) also acknowledge that the RFP, the winning bid(s), contract structure(s) and the resulting initiatives(s) will be subject to Illinois law, as amended from time to time, and regulatory oversight by the Illinois Commerce Commission. In certain cases, AIC, its Prime Implementer, and a selected bidder may upon mutual agreement agree that a selected bidder will subcontract services related to an initiative under AIC's Prime Implementer contract.

## Program Term

Bidder(s) proposals for initiatives under this RFP must be for each of the years (as applicable per the Budget and Savings Tables in Section 2.1 of this RFP) commencing January 1, 2026, January 1, 2027, January 1, 2028, and January 1, 2029, as part of the Plan.

## Target Market and Scope of Services

Initiatives or measures selected through this solicitation will be offered to all Ameren Illinois customers eligible to participate in the corresponding initiatives. Ameren Illinois is specifically seeking proposals for the initiatives and/or channels listed in the table below. These offerings are designed to complement initiatives that are part of the Residential and Business Programs under the Plan. Exhibit 1.1-Appendix H to the 2026-2029 Plan (see footnote 3), contains the target strategy and the segment(s) applicable to each initiative, as well as expanded descriptions of each initiative. The expanded descriptions are meant to provide Bidders with sufficient understanding of the initiatives, but Bidders are encouraged to propose innovative approaches to achieve savings for targeted customer groups within the available budgets.

| **Initiative** | **Channel** | **Initiative Sector** | **Technology Identified (Measures)** | **Geographic Area Identified** |
| --- | --- | --- | --- | --- |
| Market Rate Single Family | Home Efficiency | Residential | Insulation, Air sealing, Smart thermostats, duct sealing. | All AIC territory |
| Retail Products | Point of Purchase (POP) Retail Products | Residential | Freezers, washers, t-stat, Heat pump water heater, electric dryer, refrigerator, room ac, in ground pump pool, lighting, advanced power strips, air source heat pump, air purifier, de-humidifier, vent fan, water cooler, gas water heater, ev home charger), tankless water heaters, smart thermostats, smart plugs | All AIC territory |
| Retail Products | Online Marketplace includes opportunities for Income qualified | Residential | Smart stats, air purifiers, advanced power strips, kitchen aerators, showerheads, weatherstripping, switch and outlet gaskets, door sweeps, smart plugs, ev chargers, | All AIC territory – for IQ marketplace there is a deemed split on opportunities by zip code. |
| Income Qualified | IQ Retail Products | Residential | LED bulbs, LED fixtures, smart plugs, advanced power strips, air purifiers, showerheads, faucet aerators, door sweeps, pipe insulation | Designated IQ zip codes and retail channels (thrift, dollar |
| Retro-Commissioning | Traditional (On-Site) | Business | *Adjustment of the following:*   * *Systems that simultaneously heat and cool Inoperable economizers* * *Pumps with throttled discharges* * *HVAC equipment set points and run time schedules that do not correlate with actual building use* * *Lighting control schedules that do not correlate* * *Improper building pressurization* * *Short cycling of equipment* * *Variable frequency drives that operate at unnecessarily high or constant speeds* * *Occupancy sensors and photocells which are not calibrated or are not functioning as intended* * *Office equipment with power management features disabled* * *HVAC Systems which have not been recently tested, adjusted, and balanced* * *Lack of cleaning of air side heat transfer surfaces and filters (filter replacement energy savings cannot be claimed towards project energy savings requirements)* * *Room thermostats, duct thermostats, humidistats, and temperature sensors requiring calibration* * *Inoperable or malfunctioning dampers and valve controls* * *Chilled-water systems not utilizing automated chilled-water reset* * *Chilled-water systems requiring chiller tube cleaning and improve water treatment Improved boiler controls* * *Heat recovery chiller adjustments* * *Heat recovery heat exchangers adjustments* * *Install and repair economizers* * *Repair insulation around domestic hot water tanks, steam and hot water distribution lines, condensate return lines, deaerator tanks, and boiler feedwater storage tanks* * *Repair or upgrade the heating insulation surfaces of boilers*   *Adjust boiler blowdown rates* | All AIC Territory |
| Retro-Commissioning | Virtual Retro-Commissioning | Business | *Adjustment of the following:*   * *Systems that simultaneously heat and cool Inoperable economizers* * *Pumps with throttled discharges* * *HVAC equipment set points and run time schedules that do not correlate with actual building use* * *Lighting control schedules that do not correlate* * *Improper building pressurization* * *Short cycling of equipment* * *Variable frequency drives that operate at unnecessarily high or constant speeds* * *Occupancy sensors and photocells which are not calibrated or are not functioning as intended* * *Office equipment with power management features disabled* * *HVAC Systems which have not been recently tested, adjusted, and balanced* * *Lack of cleaning of air side heat transfer surfaces and filters (filter replacement energy savings cannot be claimed towards project energy savings requirements)* * *Room thermostats, duct thermostats, humidistats, and temperature sensors requiring calibration* * *Inoperable or malfunctioning dampers and valve controls* * *Chilled-water systems not utilizing automated chilled-water reset* * *Chilled-water systems requiring chiller tube cleaning and improve water treatment Improved boiler controls* * *Heat recovery chiller adjustments* * *Heat recovery heat exchangers adjustments* * *Install and repair economizers* * *Repair insulation around domestic hot water tanks, steam and hot water distribution lines, condensate return lines, deaerator tanks, and boiler feedwater storage tanks* * *Repair or upgrade the heating insulation surfaces of boilers* * *Adjust boiler blowdown rates* | All AIC territory |
| New or Innovative Initiatives |  | Open to receiving recommendations or implementation details for initiatives that do not duplicate, compete with, or replace initiatives already outlined in AIC 's 2026-2029 Energy Efficiency Plane | | |

## TRC Test

A minimum requirement for consideration is that each initiative must pass the TRC test with a benefit-cost ratio greater than or equal to 1.0, as calculated in accordance with the criteria set forth in the Act, the Illinois Energy Efficiency Policy Manual, Version 3.0,[[6]](#footnote-7) any pertinent Illinois Commerce Commission orders, and as determined by AIC, provided, however, that measures offered to low-income customers[[7]](#footnote-8) need not be cost-effective (e.g., measures offered under the *IQ Retail Products, IQ Online Marketplace,* *or any new and innovative income qualified* initiative(s)).

* Bidder(s) should be aware that there may be additional costs to administer the measure(s). The categories may include but not be limited to: portfolio awareness marketing and education, evaluation, measurement and verification (“EM&V”), and general administration.
* Cadmus will perform the TRC calculation for the measure bundle, if applicable. If the measure bundle has a TRC value of greater than 1.0, Cadmus will then review the individual measures. To the extent cost ineffective measures are identified, Cadmus and AIC will work with the Bidder to either remove or minimize the use of these measures, unless those measure(s) will be offered to low-income customers.
* AIC reserves the right to request additional documentation and to make reasonable adjustments to values or assumptions provided by the Bidder. In such cases, AIC will provide the proposed adjustments to the Bidder for review.
* For multi-year bids, AIC intends to analyze TRC at both the annual year and multi-year terms.

# Program and Bidding Guidelines

The purpose of this RFP is to primarily solicit third party proposals to the identified initiatives described in Section 1.3. Bidder(s) may bid on one or more of these initiatives, provided that:

* Initiatives (1) and (2) below must be bid together, and (3) and (4) must be bid together. Proposals that include (1), (2), (3), and (4) under a single Bidder will be preferred.

1. Retail Products – POP
2. Income Qualified – IQ Retail Products
3. Retail Products – Online Marketplace
4. Income Qualified – IQ Online Marketplace
   * Please note that the initiatives listed have separate budgets in Section 2.1.

|  |  |  |  |
| --- | --- | --- | --- |
| **Preference** | **Requirement** | **Initiative** | **Channel** |
| Bidder Proposals including all 4 - Preferred | Must be Bid Together | 1. Retail Products | Point of Purchase (POP) Retail Products |
| 2. Income Qualified | IQ Retail Products |
| Must be Bid Together | 3. Retail Products | Online Marketplace |
| 4. Income Qualified | Online Marketplace includes opportunities for Income qualified |

Bidders must itemize their bid detailing each initiative or measure bundle. Proposals for multiple initiatives may be provided by a single bidder. If multiple initiatives are provided by a single bidder, the bidder shall still break out details by initiative for at-least the following documents in this RFP: Proposal Cover document (outlined in section 4.0-4.8), Exhibit 2, Exhibit 9 and the contents of section 2.7 of this RFP. AIC reserves the right to assign higher scoring to proposals that deliver administrative efficiencies and/or are deemed to better fit AIC’s overall energy efficiency portfolio offerings.

## Program Parameters

* Available electric and natural gas budgets and energy savings targets are described in the table below and are reflective of AIC's 2026-2029 Energy Efficiency Plan as filed with the Illinois Commerce Commission in Docket No. 25-0211. Additional information on initiative budgets and savings targets is available in Exhibit 2.

**Electric Budgets**

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **Initiative** | **Channel** | **Total Budget (Electric)** | | | |
| **2026** | **2027** | **2028** | **2029** |
| Market Rate Single Family | Home Efficiency | $851,838 | $851,838 | $851,838 | $851,838 |
| Retail Products | POP Retail Products | $3,275,102 | $3,275,102 | $3,275,102 | $3,275,102 |
| Retail Products | Online Marketplace | $593,147 | $593,147 | $593,147 | $593,147 |
| Income Qualified | IQ Retail Products | $1,074,564 | $1,074,564 | $1,074,564 | $1,074,564 |
| Income Qualified | IQ Online Marketplace | $529,146 | $529,146 | $529,146 | $529,146 |
| Retro-Commissioning | Traditional (On-Site) | $1,062,555 | $1,062,555 | $1,062,555 | $1,062,555 |
| Retro-Commissioning | Virtual Retro-Commissioning | $1,020,000 | $1,020,000 | $1,020,000 | $1,020,000 |
| **3rd Party Program Spend** | | **$8,406,353** | **$8,406,353** | **$8,406,353** | **$8,406,353** |
|  |  |  |  |  |  |

**Electric Energy Savings Targets (Annual MWh Savings)**

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **Initiative** | **Channel** | **Total MWh Savings** | | | |
| **2026** | **2027** | **2028** | **2029** |
| Market Rate Single Family | Home Efficiency | 1,059 | 1,059 | 1,059 | 1,059 |
| Retail Products | POP Retail Products | 13,300 | 13,300 | 13,300 | 13,300 |
| Retail Products | Online Marketplace | 2,029 | 2,029 | 2,029 | 2,029 |
| Income Qualified | IQ Retail Products | 6,820 | 5,990 | 5,990 | 5,990 |
| Income Qualified | IQ Online Marketplace | 2,723 | 2,723 | 2,723 | 2,723 |
| Retro-Commissioning | Traditional (On-Site) | 3,500 | 3,500 | 3,500 | 3,500 |
| Retro-Commissioning | Virtual Retro-Commissioning | 5,000 | 5,000 | 5,000 | 5,000 |
| **3rd Party Program Savings** | | 34,431 | 33,601 | 33,601 | 33,601 |

**Electric Cost per kWh (Investment/Annual Savings)**

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **Initiative** | **Channel** | **Electric Yield ($/kWh)** | | | |
| **2026** | **2027** | **2028** | **2029** |
| Market Rate Single Family | Home Efficiency | $0.80 | $0.80 | $0.80 | $0.80 |
| Retail Products | POP Retail Products | $0.25 | $0.25 | $0.25 | $0.25 |
| Retail Products | Online Marketplace | $0.29 | $0.29 | $0.29 | $0.29 |
| Income Qualified | IQ Retail Products | $0.16 | $0.18 | $0.18 | $0.18 |
| Income Qualified | IQ Online Marketplace | $0.19 | $0.19 | $0.19 | $0.19 |
| Retro-Commissioning | Traditional (On-Site) | $0.30 | $0.30 | $0.30 | $0.30 |
| Retro-Commissioning | Virtual Retro-Commissioning | $0.20 | $0.20 | $0.20 | $0.20 |

**Natural Gas Budget**

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **Initiative** | **Channel** | **Total Budget (Gas)** | | | |
| **2026** | **2027** | **2028** | **2029** |
| Market Rate Single Family | Home Efficiency | $523,459 | $523,459 | $502,886 | $502,886 |
| Retail Products | POP Retail Products | $569,329 | $569,329 | $569,329 | $569,329 |
| Retail Products | Online Marketplace | $996,762 | $996,762 | $996,762 | $996,762 |
| Income Qualified | IQ Retail Products | $449,138 | $449,138 | $449,138 | $449,138 |
| Income Qualified | IQ Online Marketplace | $2,960,087 | $2,960,087 | $2,960,087 | $2,960,087 |
| Retro-Commissioning | Traditional (On-Site) | $19,325 | $19,325 | $19,325 | $19,325 |
| Retro-Commissioning | Virtual Retro-Commissioning | $18,552 | $18,552 | $18,552 | $18,552 |
| **3rd Party Program Spend** | | **$5,536,652** | **$5,536,652** | **$5,516,079** | **$5,516,079** |

**Natural Gas Energy Savings Targets (First Year Therm Savings)**

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **Initiative** | **Channel** | **Total Therms Savings** | | | |
| **2026** | **2027** | **2028** | **2029** |
| Market Rate Single Family | Home Efficiency | 98,491 | 98,491 | 97,198 | 97,198 |
| Retail Products | POP Retail Products | 110,705 | 110,705 | 110,705 | 110,705 |
| Retail Products | Online Marketplace | 582,981 | 582,981 | 582,981 | 582,981 |
| Income Qualified | IQ Retail Products | 92,868 | 92,868 | 92,868 | 92,868 |
| Income Qualified | IQ Online Marketplace | 788,099 | 788,099 | 788,099 | 788,099 |
| Retro-Commissioning | Traditional (On-Site) | 25,000 | 25,000 | 25,000 | 25,000 |
| Retro-Commissioning | Virtual Retro-Commissioning | 35,000 | 35,000 | 35,000 | 35,000 |
| **3rd Party Program Savings** | | **1,733,144** | **1,733,144** | **1,731,851** | **1,731,851** |

* Ameren Illinois expects all initiatives awarded through this RFP to launch January 1, 2026 and achieve annual agreed upon savings within the approved planned budgets shown above.
* Bidder(s) must perform their own market research and apply their expertise to determine the realistic amount of savings they can achieve, as well as the budgets needed, and then provide sufficient support for such assumptions in their bid so that Cadmus and AIC can assess the proposals. Please note, competitive pricing and proposing realistic magnitudes of kWh savings will be important selection factors on which qualified bid(s) are accepted.

## 2.2 Key Considerations

Bidder(s) must note the following when developing responses:

* Estimated savings must be provided as net savings including net-to-gross (“NTG”) estimations and measure values. Bids must include proposed NTG ratios.[[8]](#footnote-9) Each year the Illinois Commerce Commission approves prospective NTG ratios in advance of implementation for planned initiatives and measures. The proposals will be evaluated using the Commission approved prospective NTG ratios for planned initiatives and measures already identified in AIC’s 2026-2029 plan. For measures proposed by Bidder but not already identified in the plan, a NTG ratio should be proposed and justified. However, the actual NTG ratio for the new measures will be determined at a later date, likely when evaluating net savings.
* AIC will only consider proposals with verifiable and measurable electric and gas energy savings using best practices. The Illinois Statewide Technical Reference Manual (“TRM”) provides standardized savings values and algorithms for a wide range of measures. Where proposed measures exist in the TRM, Bidder(s) must propose bids that apply the most current TRM.[[9]](#footnote-10) For proposed measures that do not exist in the TRM, Bidder(s) must provide work papers and/or evaluations that define the algorithms, parameters, and input values that were used to estimate energy savings. Bidder(s) are required to provide specific TRM algorithm or alternate algorithm calculations in their bid savings.
* Bidders are required to itemize all costs in their bids (such as incentives, marketing, customer care, labor including subcontractors, material costs, initiative management, reporting, etc.) in accordance with the Illinois Energy Efficiency Policy Manual, v.3.0 and document in the applicable sections of Exhibit 2. If the initiative proposed receives revenue from any source, the source and expected amount of revenue should be included in the bid proposal.
* Each measure that is implemented will be subject to evaluation requirements consistent with policies authorized by the ICC.
* Net savings evaluation will be conducted by an independent evaluator at the close of each program year, although evaluation activities may be ongoing throughout a program year. Process evaluation may also be performed for items such as overall initiative performance, marketing approach, implementation channels, outreach activities and customer satisfaction.
* The Bidder will be subject to the requirements of the Illinois Energy Efficiency Policy Manual and the TRM, as updated from time to time.
* Bidder(s) must have nexus in Illinois as defined by the State of Illinois, be registered with the Illinois Department of Revenue for sales tax and use tax and accept responsibility for issuing Form 1099 as required by law.
* If bidders are proposing a new or innovative initiative, they must consider and sufficiently explain impact of any Bid on the other offerings included in AIC's Approved Plan (in terms of duplicating, competing or replacing defined measures or Initiatives that are included in AIC’s 2026-2029 Plan but are not included in this RFP), as well as how the Bidder believes the new or innovative initiative, if implemented, provides overall and/or incremental value to AIC customers.
* Bidders must provide all the required information set forth in Section 3 and 4 of this RFP, but should consider that the evaluation criteria will include:
  + Pricing and cost-effectiveness: pricing and cost-effectiveness will be given substantial weight*;* ***Bidders are encouraged to provide competitive pricing that provides equal or better costs and savings as outlined above***.
  + Innovation and strength of offerings with justified and credible assumptions for budgets, savings and participation based on market analysis. Proposed initiative budgets with proportionally lower administrative costs will be preferred.
  + Demonstrated synergy with the goals and objectives identified in AIC’s 2026-2029 Plan, as filed with the Commission.
  + Demonstrative experience of the Bidder in the proposed initiative or measure.
  + Qualifications of key personnel that would implement the proposed bid.
  + Other factors deemed important by Cadmus and/or AIC, which demonstrate overall value to AIC’s customers may be applied during the evaluation process. Bidders are encouraged to consider and explain why a Bid would deliver such value.

## Accountability and Obligation

By responding to this RFP, Bidder(s) acknowledge that:

* Bidder(s) will be expected to achieve the savings within the budget as provided in their bid, or revised for submission if requested by AIC, for the timeframe proposed.
* Initiative administration, implementation and assumptions are subject to legal and regulatory changes, including the TRM and annual evaluation results. Bidder(s) acknowledge that their bid assumptions may be revised as necessary to conform with the TRM in effect at the time of initiative delivery and that they will confirm their continued intent to proceed with the bid based on the revised savings targets within the original budget submitted to AIC.
* AIC shall require that payment **must** include a pay for performance contracting mechanism where selected Bidder(s) will receive compensation that will be directly tied to certain negotiated performance metrics such as pay per net kWh and Therm saved, subject to pre-determined holdbacks, customer make whole, and other payment related provisions as applicable, as determined by Ameren Illinois. Bidders should propose the pay for performance approach in Exhibit 9; however AIC reserves the right to reject the approach and suggest an alternative for consideration and agreement by the Bidder. Please note that acceptance of any bid is contingent on Bidder and AIC coming to mutually agreeable terms with respect to performance, contract requirements and payment.
* The winning bid(s), including contract terms, will be subject to any changes to AIC’s internal policies and procedures, as well as any changes to any TRM or NTG values, implementation, administration, or ICC rulings arising from AIC’s regulation by the ICC, or necessitated by a change in law or regulation affecting AIC’s 2026-2029 Plan.

## Marketing

The selected Bidder will be responsible for paying the direct costs of and managing, executing, securing, documenting, and reporting energy savings and marketing of the measure(s) under the guidance of and in partnership with AIC and its prime implementer. **While it may be determined that it is more feasible for all marketing activities to be coordinated by AIC and/or its Prime Implementer, Bidder(s) should assume this responsibility for the purposes of this bid.** Final determination will be made during contract negotiations.

All aspects of initiative design and implementation, marketing plans, materials, and outreach activities, including all customer-facing aspects of the initiative, must be consistent with Illinois law, as well as reviewed and approved by AIC.

## Initiative Payment and Budget Design

Initiative budget(s) shall be designed on a not-to-exceed basis. Bids must include a pay-for-performance structure, in whole or in part. Bidders are encouraged to propose initiative payment structures that involve multiple compensation methods such as time and materials or fixed fee; a performance pay mechanism; and actual pass-through incentive costs (if applicable) that are appropriate for the proposed program. The verified net kWh or Therms saved will be determined by an independent evaluator after the end of the program year. Release of any holdback and/or initiative payment true-up if applicable will occur after the evaluation period, which is approximately six months after the end of the program year.

##### Payment of Incentive/Rebates

If customer incentives (rebates) and/or services (*e.g.*, direct install, energy audits) or other incentives are part of the initiative design, the implementer will make payment of incentives to the appropriate party and/or provide such services and report such payments or services on a monthly basis to AIC.

As applicable, the Bidder will propose a budget and a process for payment of customer incentives and/or providing of services. If the incentive amount is not a fixed price per unit, the Bidder will describe how the amount is determined for each customer or measure.

**Selected Bidder Payments**

Except as otherwise set forth herein or otherwise agreed to by AIC and selected Bidder, all complete and undisputed invoices shall be due and payable within 30 days of receipt by AIC. AIC may withhold payment of any charges if, at AIC’s sole discretion, documentation or additional support is needed or AIC disputes in good faith the invoice, in whole or in part. AIC may set off amounts selected Bidder owes AIC as credits against charges payable to selected Bidder under the contract.

## Initiative Integration

Selected Bidder(s) may be required to develop and operate systems that integrate project-level data into AIC 2026-2029 EE Plan operations. As an example, AIC will have a system to track savings. AIC expects Bidder(s) to comply with and provide information to be tracked in that system. Other integration items include:

* *Staff.* Staff will be employed by the selected Bidder but will perform under the rules and guidance of AIC and/or AIC’s prime implementer. Selected Bidder(s) must provide trained personnel, as needed, throughout the Ameren Illinois’ service territory, and are able to respond to customer inquiries regarding initiative services, scheduling issues, warranty issues, and other initiative-related issues.
* *Internet Capability*. Initiative-specific internet and website initiative information and participation will be integrated with the current Ameren Illinois Energy Efficiency web platform. Any additional costs anticipated to merge an initiative to this platform must be part of the bid.
* *Information Security.* Bidder(s) will be required to have in place security protocols and policies that comply with local, state and federal law, including the orders of the ICC, as well as AIC’s own policies on electronic data and cybersecurity, and interchange as it relates to the security of customer and company information, and the appropriate treatment of customer information. Bidder requirements pertaining to cyber security are included in Exhibit 8.In the event a Bidder desires to leverage certain capabilities or assistance (e.g., data tracking, incentive processing, program ally management, etc.) from AIC or its Prime Implementer to implement any initiative for which Bidder submits a bid, such assumption(s) should be clearly outlined and detailed in Bidder's proposal (per Exhibit 9).

## Initiative Operations

Initiative operation costs as a category should be itemized separately on the bid and be inclusive of the items in this section in addition to other initiative operations cost requirements.

During contract negotiations, it may be determined that the following items will be coordinated by AIC or its prime implementer, but Bidder(s) should assume this responsibility for the purposes of this bid:

***Intake:*** Selected Bidder(s) will develop and implement intake systems and processes to answer questions from prospective customers, screen for initiative eligibility and target markets (per Exhibit 9).

***Quality Assurance and Evaluation Support:*** Selected Bidder(s) will develop and implement a quality assurance protocol to ensure that the initiative achieves net energy savings. Selected Bidder(s) will also provide documentation sufficient for AIC, its prime implementer and an independent evaluator to evaluate the initiative in terms of safety, customer service, and other performance metrics as determined by these entities (per Exhibit 9).

***Access:*** Selected Bidder(s) will assist AIC’s independent evaluator, providing access to initiative records, access to initiative employees and subcontractors to answer questions and provide interviews, and other support as needed. Selected Bidder(s) shall accommodate AIC’s need to audit selected Bidder initiative processes and field activities, including subcontractor activities and will provide any information and assistance upon request (per Exhibit 9).

***Initiative Management Systems and Processes:*** Selected Bidder(s) will develop, document and implement initiative management systems and processes that support effective initiative management and delivery (in Exhibit 9). Initiative management systems may include computer systems, employee procedures, or other systems. AIC will retain all rights to data, results, and any other information collected/developed during the performance of these initiatives. At a minimum, these systems (documented Processes or Policies) must be capable of supporting the following functions:

* Processing customer intake requests and screening customers for eligibility.
* Procuring and managing the qualified subcontractors and trade allies required to implement the initiative and providing sufficient capacity of staff and qualified subcontractors to meet initiative demand in the geographic regions targeted by the initiative. All contractors shall have or obtain all required licenses, certifications, permits and insurance for the work proposed in a form or substance required by AIC during contract negotiations.
* Providing appropriate training to selected Bidder(s) staff, subcontractors, and trade allies needed to provide the initiative services.
* Ensuring the safety of Bidder's staff, subcontractors, trade allies and customers being served (per Exhibit 3).
* Providing timely resolution to customer complaints and issues, with documented call center scripting and complaint escalation processes (per Exhibit 9).
* Surveying customer satisfaction (per Exhibit 9).
* Collecting and storing contact information, including phone numbers and email addresses, for trade allies and participants.
* Collecting and storing data on customer energy savings and customer work flow through initiative implementation steps.
* Interfacing with AIC portfolio tracking systems, allowing for secure (possibly weekly) automated data transfers of key initiative metrics meeting all of AIC’s data transfer protocols (per Exhibit 8).
* Maintaining privacy of customer, trade ally and participant data. Selected Bidder(s) 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 (per Exhibit 8).
* Tracking information needed to assess key performance indicators used to measure and structure payments for selected Bidder(s) performance, including tracking safety, customer satisfaction, participation, energy savings, and other initiative features (per Exhibit 3 and 9).
* Participating in routine status conference calls, to be coordinated between AIC, AIC’s prime implementer and selected Bidder(s), as needed, for effective initiative management (per Exhibit 9).
* Providing appropriate management reports.
* Developing and maintaining policies and procedures for initiative implementation (per Exhibit 3 and 4).
* Supporting bidder MDAP and program implementation that furthers the MDI goals and objectives that are identified in Exhibit 5 – Market Development Initiative Action Plan.
* Advance AIC's core objective, including the following:
  + Aim to achieve energy savings and advance AIC's efforts to meet the cumulative persisting annual savings ("CPAS") goals set forth in the Act;
  + Focus on using energy efficiency investments in a way that will achieve the additional, important business objectives to have a positive community impact; and
  + Amplify other benefits to customers, like environmental impacts, achieved in tandem with energy savings.

***Reporting:*** Selected Bidder(s) will be required to support AIC’s independent evaluator and AIC’s prime implementer in the assessment of the Bidder(s)’ initiative(s) by providing access to initiative records and other support as needed. In addition, selected Bidder(s) will provide regular (possibly weekly, monthly, and quarterly) management reports to AIC and its prime implementer primarily through email but also through paper, as needed (per Exhibit 9). These reports may also be given to the independent evaluator, who may contact participating customers (including on-site visits) to evaluate Bidder performance and verify installations. Management reports must include, at a minimum, a summary of key activities, accomplishments, initiative status, budget status and estimated savings. Selected Bidder(s) will be required to hold monthly meetings with AIC or AIC’s prime implementer, either in person or remotely over phone or web-conference (per Exhibit 9). Selected Bidder(s) must also accommodate AIC’s need to audit Bidder’s initiative processes and field activities, including subcontractor or trade ally activities.

## Risks and Assumptions

Bidder(s) should include a list of all assumptions related to their initiative budget(s) or estimated savings. In addition, as requested in Exhibit 3, Bidder(s) should include a discussion of any risk(s) Bidder(s) foresee to their ability to achieve the savings target they propose, at their estimated budget and propose mitigation strategies for identified risk(s) (per Exhibit 3). These risks and assumptions will be used as part of the assessment of bids and failure to provide adequate information could result in removal of a bid from consideration.

# SOLICITATION PROCESS AND REQUIREMENTS

Bidder(s) interested in submitting a proposal in response to this RFP must adhere to the solicitation process set forth in this section. Failure to comply with the requirements and deadlines will result in disqualification. The dates below are estimated and subject to change.

|  |  |
| --- | --- |
| RFP Release Date | April 16, 2025 |
| Pre-Bid Bidder(s)' Conference Call | April 22, 2025 |
| Bidder Questions Deadline | April 29, 2025 (4:00 PM CDT) |
| Response to Questions Issued | May 5, 2025 (4:00 PM CDT) |
| Intent to Bid due | May 6, 2025 (4:00 PM CDT) |
| Bidder Proposal(s) Submission Due | May 20, 2025 (5:00 PM CDT) |
| Proposal Review | May 22, 2025–September 2025 |
| Notification of Bid Selection(s) | September 2025 |

## Pre-Bid Bidder(s) Conference Call

Bidder(s) are encouraged, although not required, to participate in a Pre-Bid Bidder's conference call. There is no registration required to participate in the conference call. The conference call will provide interested firms with an opportunity to seek clarification on the requirements of this RFP. Following are the schedule and instructions for the conference call:

**Date:** April 22, 2025

**Time:** 10:00 am – 11:00 am Central Time

**Teams Link**: [**Join the meeting now**](https://nam11.safelinks.protection.outlook.com/ap/t-59584e83/?url=https%3A%2F%2Fteams.microsoft.com%2Fl%2Fmeetup-join%2F19%253ameeting_Y2FlZDQzYTItZjE2My00MmE1LTgxZjAtNzg4NTNlMTYyYWY5%2540thread.v2%2F0%3Fcontext%3D%257b%2522Tid%2522%253a%25220a54996e-b3f1-4417-916c-86223d3e7505%2522%252c%2522Oid%2522%253a%252210943843-6bf6-42fd-a47b-dbcced4e7034%2522%257d&data=05%7C02%7Cqparker%40encolorconsulting.com%7Cf317805a132d454da9f808dd68a07eb2%7C0a54996eb3f14417916c86223d3e7505%7C0%7C0%7C638781760766576242%7CUnknown%7CTWFpbGZsb3d8eyJFbXB0eU1hcGkiOnRydWUsIlYiOiIwLjAuMDAwMCIsIlAiOiJXaW4zMiIsIkFOIjoiTWFpbCIsIldUIjoyfQ%3D%3D%7C0%7C%7C%7C&sdata=oKIhrVoUS0bxJ12jqACwxH6IulO6vfn2Y%2Fs4f9t3jUU%3D&reserved=0)

Conference Line: 323.792.6150

Access Code: 379 571 077#

**RFP Questions, Inquiries, Clarifications**

Questions, inquiries and clarifications regarding this RFP must be received by Cadmus no later than 4:00 PM Central Time on April 29, 2025. Outside of the Pre-Bid Bidder(s)’ conference call, all questions, inquiries, and clarifications will be handled by email only at [Aic.BidReview2026-2029@cadmusgroup.com](mailto:Aic.BidReview2026-2029@cadmusgroup.com)), and the responses distributed to those who submitted an intent to bid or those who sent a direct request to [Aic.BidReview2026-2029@cadmusgroup.com](mailto:Aic.BidReview2026-2029@cadmusgroup.com)).

## Intent to Bid

Potential Bidder(s) are strongly encouraged to submit a notification of intent to submit a proposal in response to this RFP. Notification of your intent to bid should be received by Cadmus no later than 4:00 PM Central Time on May 6, 2025. Complete and also provide “[insert bidder company name]\_Exhibit 1-Intent-to-Bid-and-General Company Information Form.pdf” with your intent to bid notice.

Bidder(s) are responsible for confirming their intent to bid was received if they so choose.

Those who submit a signed intent to bid (or if no intent to bid, those who send a direct request to [Aic.BidReview2026-2029@cadmusgroup.com](mailto:Aic.BidReview2026-2029@cadmusgroup.com)) will be provided all responses to submitted questions, as provided under Section 3.1, including any questions that are responded to after the specified question and answer period.

## RFP Due Date

All proposals should be received by Cadmus no later than 5:00 PM Central Time on May 20, 2025.

Bidders are welcome to email their proposals to the address below:

[aic.BidReview2026-2029@cadmusgroup.com](mailto:aic.BidReview2026-2029@cadmusgroup.com)

* + If the content of your proposal is too large to disseminate in a single email, please divide the correspondence into two emails and append the title of the email to number the portion of the correspondence included in the current email (as “1 of 2 emails” for the first portion and “2 of 2 emails” for the second portion, etc.)
  + If a Bidder wishes to submit multiple proposals, please separate each proposal into its own email, while also including the name of the proposal in the title of the email.

Bidders that desire to submit their proposal in an alternative manner should reach out to the email address, prior to the RFP due date, to discuss an alternative transmission: [aic.BidReview2026-2029@cadmusgroup.com](mailto:aic.BidReview2026-2029@cadmusgroup.com)

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 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 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.

## Verification of Receipt of Proposal Submission

It is the Bidder’s sole responsibility to ensure that its proposal is received at the email location (or other pre-approved method of transmission) provided in Section 3.3 by the prescribed deadline for submission.

## Proposal Preparation Cost

The cost of RFP preparation and any on-going expenses incurred during the process leading up to implementation will be the sole responsibility of the Bidder.

## RFP Updates or Cancellation

AIC reserves the right to make changes, updates or cancel the RFP. Any updates to or the cancellation of this RFP will be communicated only to prospective Bidder(s) who have indicated their intent to bid by the deadline stated in this RFP or those that have directly emailed Cadmus at [Aic.BidReview2026-2029@cadmusgroup.com](mailto:Aic.BidReview2026-2029@cadmusgroup.com).

## 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 Responses not Confidential

AIC does not guarantee that proposals will be kept confidential, including either the proposals submitted in response to the RFP or any contract/purchase order arising from the solicitation. Furthermore, AIC disclaims any liability to a Bidder or other party as a result of any public disclosure of any proposal or the resulting contract/purchase order.

## Conflicts and Disclosures

Bidder(s) also need to 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 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 an independent third party, AIC will notify each Bidder regarding the desire to conduct (or not conduct) further negotiations and/or discussions regarding proposed initiative(s). Acceptance of any proposal may be contingent upon ICC approval, pertinent ICC Orders, new legislation passed into law and the execution of a subsequently negotiated, written contract. For avoidance of doubt, this RFP creates no contractual relationship between AIC and Bidder and implementation of any initiative approved by the ICC will be subject to AIC and Bidder coming to agreement with respect to all contract terms and all exhibits and/or attachments thereto.

# Preparing and Submitting a Proposal

Proposals must include a proposal cover, a cover or transmittal letter, and a table of contents consisting of the items listed below in the order shown. Bidder(s) must address each item. If an item does not apply, the Bidder must provide an explanation. Bidder(s) should provide sufficient detail to address each item clearly and briefly, but should avoid excessive or elaborate submittals. Pages must be numbered and dated. The required exhibits and attachments 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. For each proposed initiative, the Bidder should include:

## Executive Summary

Bidder shall provide an executive summary that includes a high-level summary of the proposal as well as a brief description of the proposed measures and approach (limit of 2 pages). If the Bidder is submitting proposals for more than one initiative, any synergies or savings from the implementation of multiple initiatives can be described in the executive summary.

## Initiative Description and Schedule. *Address at least the following:*

* The description should summarize the market or market segment being served, the applicable electric and/or gas efficiency measures that will be implemented, and how the measures will be marketed and delivered.
* Bidders are encouraged to explain how the proposal(s) would synergize with the current offerings of AIC’s Plan, and how the proposal(s) demonstrate overall value to AIC’s customers. Bidders proposing new or innovative approaches should address how the proposals do not duplicate or seek to replace existing initiatives within the Plan, as well as explain with sufficient detail how the Bidder anticipates its proposal will complement existing Initiatives in a manner that is consistent with the overall goals of the Plan without adversely impacting the Plan. Bidder(s) should describe how their approach to delivery and implementation of energy efficiency measures will verify that customers receiving the energy efficiency measures are actually AIC electric customers and natural gas customers where applicable. If Bidder’s delivery and implementation approach cannot verify energy efficiency measures are delivered to AIC electric and/or gas customers, Bidder(s) should describe the steps the Bidder will take to minimize delivery of energy efficiency measures to non-AIC electric and/or gas customers, and the assumption used by Bidder as to what proportion of products will be installed by AIC electric and/or gas customers.
* To the extent any bids propose controlling a device within the home or business, the Bidder must fully explain the extent of the control and how it will obtain consent from the utility customer prior to implementation.
* The proposed schedule should address initiative planning, launch and operations, focusing on the time required from contract award to full operation. The schedule should be in bar chart or tabular form with key milestone dates.
* The schedule should also address the steps required for initiative sunset.

## Marketing Strategy

The marketing strategy should be based on market analysis and define the target market and how the Bidder intends to reach the market as well as the delivery approach, including any reliance on or leveraging any AIC administrative or marketing assistance. The Bidder should address key messaging and the value proposition that will be used to attract participants.

## Market Development Action Plan

In addition to a marketing strategy that will support successful implementation of the initiative(s), Bidders must acknowledge that they will be required to develop a Market Development Action Plan (MDAP) to support Ameren Illinois' efforts to achieve the objectives of its Market Development Initiative as described in Section 3.12.5 of the AIC 2026-2029 Plan[[10]](#footnote-11) and Exhibit 5 herein. In addition, the MDAP developed by Bidders, post contract award, will need to identify opportunities for partnering with local business enterprises and non-profit and community-based organizations.

## Summary of Qualifications and Experience

Bidders should provide a summary of qualifications and experience including, but not limited to:

* Proven ability to accurately plan as well as manage, design and implement proposed initiatives efficiently and effectively.
* *Overall Relevant and Recent Project Experience***:** Bidder(s) shall describe their team’s relevant and recent experience implementing projects with similar measures and scope (per Exhibit 3). For each experience discussed, Bidder(s) must provide the following:
* Energy Efficiency program/initiative name and location where implemented
* Entity for whom the program/initiative was implemented
* Budgeted dollars, budgeted savings, actual dollars, and achieved savings
* A copy of the evaluation results if the program/initiative was evaluated
* *Client References***:** Bidder(s) shall provide three (3) client references including each reference’s company name, contact information (name, title, phone number, and email) in Exhibit 3. At least one reference must be from a project listed under *‘Overall Relevant and Recent Project Experience.’*

## Staffing (including subcontractors)

Bidder(s) shall describe how the initiative will be staffed. Staff will be employed by the selected Bidder but will perform under the rules and guidance of AIC and/or AIC’s prime implementer. The staffing plan must include the following information:

* **Roles and Responsibilities:** Identify and describe key personnel, their role(s) and their primary responsibilities.
* **Subcontractor Responsibilities:** Describe how subcontractors will be integrated into the Initiative staffing structure and identify their responsibilities. (If specific subcontractors have not been identified but are planned, use generic identifiers.) Headquarters and office locations of any subcontractor(s) should also be included.
* **Rates and Hours:** Estimate staff hours and list proposed hourly rates by role. Hourly rates should be “all inclusive” with no expectation on the part of Contractor to charge AIC for any additional employee benefits.
* **Staff Qualifications:** Bidder shall summarize staff qualifications (per Exhibit 3). This will enable AIC to determine whether the skills and experience of individuals assigned are appropriate to the work requirements. Note, if Bidder is selected for award, any changes to the identified key personnel described in the proposal must be approved by AIC.
* **Organizational Chart:** Bidder(s) should provide an organization chart with the key positions and individuals within the Bidder and subcontractors’ organizations responsible for designing, implementing and marketing.

Full resumes or bios may be attached to the proposal.

## Proposed Budget

* Bidder(s) must provide a budget in the format provided, within Exhibit 2, for each year the bidder proposes to offer the initiative. Budget items are defined as follows, and Bidder should clearly explain what is included in each item:
  + - Administration includes the on-going administrative costs to support initiative operations. These may include tracking, reporting, subcontractor administration, call center and customer support operations, etc.
    - Marketing includes advertising, customer outreach and education, development and production of marketing materials, website and content development, media purchases (if any), and related expenses.
* Delivery includes the costs of application intake, pre-qualification, incentive processing, technical support, and other costs related to applicant project support.
  + - Incentives are payments made to reduce the customers’ costs of energy efficiency measures. Incentives are not intended to eliminate customers’ costs for purchasing and installing measures. If measures are provided at no cost to the customer, those costs should be provided separately as the Costs of Direct Delivery (see below). The product of the Estimated Annual Participation Units and the Incentive Per Unit provided in Exhibit 2 should equal the Incentives in the Budget Item table.
    - Costs of Direct Delivery apply to certain initiatives where the full cost of measures, including installation, is provided at no charge to the customer. Many residential direct install initiatives provide some measures at no charge to the customer. The product of the Estimated Annual Participation Units and the Direct Delivery of Free Measures provided in Exhibit 2 should equal the Costs of Direct Delivery in the Budget Item table.

## Detailed Efficiency Measure Information

* Each proposed measure must be provided with the information required in Exhibit 2, which includes examples for illustrative purposes (see Measure Level Detail tab). There is no limit on the number of measures that may be submitted as part of an initiative. For multi-year initiatives, please specify measures and participation for each year.
* For measures that are covered by the TRM, Bidder(s) must propose bids that apply the most current, Commission-approved TRM and are responsible for ensuring that proposed measure values comply with TRM calculation methodologies and/or deemed savings values.
* Bidder(s) must provide estimated annual participation, and/or number of efficiency units deployed, and estimated NTG ratios. The TRM does not provide participation or NTG ratios. NTG ratios are studied and provided by independent evaluators on an annual basis.
* Where proposed measures exist in the TRM, Bidder(s) are required to include the specific TRM algorithm calculations, with all inputs and assumptions, in the spreadsheet.
* For proposed measures that do not exist in the TRM, Bidder(s) are required to provide work papers and/or evaluations that define the alternate algorithms, parameters, and input values that were used to estimate energy savings.
* AIC reserves the right to evaluate and adjust Bidder’s proposed measure information as it deems necessary.

## Required Forms, Disclosures and Exceptions

Bidder(s) shall provide their response to the following exhibits as part of their proposal submission, where applicable. Bidder(s) must include all mandatory exhibits and attachments with their response (except for instances in which the Bidder has already provided Exhibit 1 by the Intent to Bid deadline).

The Attachment-RFP Files list provides a tabulation of exhibits and supporting attachments used in the RFP. This list aims to aid the Bidder when including documentation and to provide the Bidder with the requested naming convention for the files. (Note: Bidder remains responsible for completing all requirements of the RFP, regardless of what is included in the Attachment-RFP Files list). The Attachment-RFP Files list is provided here:



Bidder(s) should use the naming convention mentioned in the Attachment-RFP Files list. For example: “[insert bidder company name]\_Exhibit 2\_Energy Savings and Budget Template\_[insert initiative name].xlsx”.

A brief description of the specific Exhibits is as follows:

1. **Exhibit 1—**Intent to Bid andGeneral Company Information Form. Bidder shall submit the General Company Information Form as part of its intent to bid.
2. **Exhibit 2**—Energy Savings and Budget Template
3. **Exhibit 3—**Supplier Response Form. Bidder(s) must complete and include as attachment. Failure to properly complete and include certification may subject the bid to disqualification.
4. **Exhibit 4** – Quality Questionnaire. Bidder(s) must complete and include as attachment. Additional documents specified in the questionnaire should be included as attachments as well.
5. **Exhibit 5—**Market Development Action Plan (MDAP). Bidders must acknowledge that if a Bidder’s proposal is selected, Bidder will be required to develop an MDAP in connection with any contract entered into with Ameren Illinois, using the requirements outlined in Exhibit 5, as part of implementation services for the initiatives. For the RFP, Bidder should respond in section 4.4.
6. **Exhibit 6**—Energy Efficiency Program Services Agreement Terms and Conditions. The contract awarded to Bidder as a result of this RFP will be subject to AIC’s Energy Efficiency Program Service Agreement Terms and Conditions, which can be modified at any time. Any Bidder exceptions to these terms must be specifically objected to by providing redlined version as Exhibit 6 of your 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.
7. **Exhibit 7**─Statement of Work. This document defines the roles and responsibilities of AIC and the Bidder under the Energy Efficiency Program Services Agreement. Any Bidder exceptions to these terms must be specifically objected to by providing redlined version as Exhibit 7 of your 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.
8. **Exhibit 8─**Digital Questionnaire. Bidder(s) will be required to have in place security protocols and policies that comply with local, state and federal law, including the Orders of the ICC, as well as AIC’s own policies on electronic data security and interchange as it relates to the security of customer information, and the appropriate treatment of customer information, each of which can be modified at any time. The contract awarded to Bidder as a result of this RFP will be subject to AIC’s Information Access and Cyber Security Terms and Conditions. Any Bidder exceptions to these terms must be specifically objected to by providing redlined version as Exhibit 8 of your 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.
9. **Exhibit 9**─Program Template

# EXHIBITS

Bidder(s) should submit, in completed form, the following forms, certifications, templates and questionnaires and those Exhibits that are applicable to the Bidder’s proposal. Content included in Exhibit 2 is provided to serve as an example of the information AIC requires. Bidder(s) should replace the existing content with content appropriate to their proposal. Bidders may add tabs or adjust rows or columns as needed. Bidders should complete one set of forms for each initiative proposed (if Bidder is proposing initiatives for “Retail Product – POP” & “Income Qualified – IQ Retail Products”, these are to be bid together and utilize the same implementer. If Bidder is proposing “Retail Products - Online Marketplace” & “Income Qualified – IQ Online Marketplace” these are to be bid together and utilize the same implementer).

Exhibit 1—Intent to Bid and General Company Information Form



Exhibit 2— Energy Savings and Budget Template



Exhibit 3—Supplier Response Form



Exhibit 4—Supplier Quality Questionnaire



Exhibit 5—Market Development Action Plan (For Reference)



Exhibit 6— Energy Efficiency Program Services Agreement Terms and Conditions



Exhibit 7— Statement of Work



Exhibit 8—Digital Questionnaire



Exhibit 9—Program Template



**APPENDIX A: INITIATIVE DESCRIPTIONS**

As mentioned in Section 1.3 above,Exhibit 1.1-Appendix H to the 2026-2029 Plan (see footnote 3) contains detailed descriptions for the initiatives in this RFP. However, specific guidance for Traditional and Virtual Retro Commissioning, and New or Innovative initiatives, is as follows:

**Retrocommissioning (Traditional On-Site)**

**Purpose of the Initiative**

The Retrocommissioning Initiative identifies and implements no cost/low cost (zero-to-one year payback) energy efficiency measures, which will optimize the operation of existing systems for building automation, compressed air, industrial ventilation, industrial refrigeration and healthcare-related systems. The implementation of retrocommissioning studies and monitoring-based commissioning will be performed by a closed network of service providers and will be offered to medium to large (>20,000 sf and >100,000 sf) commercial customers and industrial refrigeration customers.

**Initiative Description**

Retrocommissioning measures are identified through on-site feasibility studies and/or active on-site monitoring software installation and continuous monitoring, wherein an energy use baseline is established and potential retrocommissioning measures are identified. Those studies are implemented at the customer site by an in-network service provider

Retrocommissioning Service Providers (RSPs) will be pre-qualified to conduct studies based upon their technical abilities and experience. Training will be provided to the RSPs by the program implementation team to ensure that the initiative adheres to both customer engagement and technical execution guidelines and expectations.

Customers and RSPs submit incentive application proposals to Ameren Illinois. RSP conducts comprehensive building survey and Implementation plan report identifies measures that must be implemented to qualify for retrocommissioning incentives. For monitoring-based commissioning, software would be installed and provide a baseline and continuous identification of new measures to improve energy performance of the building.  Following building survey or monitoring-based measure identification, efficient upgrades are recommended by RSP, reviewed by the program implementation team, and implemented by the customer.

A portion or all retrocommissioning projects will also receive a post-implementation inspection by the program implementation team

**Target Markets by Sector, Segment and Participation Eligibility Requirements**

* + Medium (>20,000 sf) and Large (>100,000 sf) commercial customers and industrial refrigeration customers

**Special Considerations**

* + Bidders' response should identify ways to engage with this commercial sector
  + Bidders' response should identify ways to provide comprehensive building surveys and implement retrocommissioning measures either through direct implementation or through use of a qualified and vetted network of retrocommissioning service providers
  + Bidders are encouraged to respond with creative/innovative ways provide energy use baseline and energy savings analysis that align with precedent for energy savings evaluation in the State of Illinois for these measure types

**Success Criteria and Metrics**

* + Bidders should detail key performance indicators in their response that include, but are not limited to, savings achieved, number of and types of facilities to participate, building study approach, measure implementation approach, energy baseline and savings calculation approach, and a detailed strategy on how they will create awareness and cross promotion with other energy efficiency offerings.

**Applicable Measures**

* + Please see the 2026-2029 Plan (via footnote 3) Exhibit 1.1-Appendix I Part 1-5.
  + Bidders may also propose additional measures to enhance the measure life or provide high impact for customers.

**Annual Budgets and Savings Targets (participation goals)**

* + See Energy Savings and Budget Template, Exhibit 2 (Program Level Detail) containing budget, participation, and savings targets.

**Opportunities for Innovative Approaches**

* + Bidders are encouraged to provide innovative approaches to outreach, engage and provide comprehensive building surveys for customers

**Retrocommissioning (Virtual Retrocommissioning)**

**Purpose of the Initiative**

The Virtual Retrocommissioning Initiative identifies and implements no cost/low cost (zero-to-one year payback) energy efficiency measures, which will optimize the operation of existing systems for building automation, compressed air, industrial ventilation, industrial refrigeration and healthcare-related systems. The implementation of retrocommissioning measures will be performed by the facility personnel via the direction and guidance of the Implementer. Virtual Retrocommissioning will be offered to Small (<20,000 sf), Medium (>20,000 sf) and Large (>100,000 sf) commercial customers; traditional and on-site retro-commissioning will be provided first priority at working with customers for energy saving measures.

**Initiative Description**

Virtual Retrocommissioning measures are identified through site energy interval data provided through the utility, wherein an energy use baseline is established and potential retrocommissioning opportunities are identified.

Implementer will perform outreach to customers with retrocommissioning opportunities to generate participation in the initiative and to help the customer make those recommended changes to their site operations.

Implementer will submit energy usage baseline and savings calculations to both the utility and the utility energy efficiency evaluator for participating customer sites.

A portion or all Virtual Retrocommissioning projects will also receive a post-implementation inspection by the program implementation team

**Target Markets by Sector, Segment and Participation Eligibility Requirements**

* + Small (<20,000 sf), Medium (>20,000 sf) and Large (>100,000 sf) commercial customers and industrial refrigeration customers

**Special Considerations**

* + Bidders' response should identify ways to engage with this commercial sector
  + Bidders' response should identify ways to evaluate utility energy usage data to identify facility opportunities
  + Bidders' response should identify ways to measure energy baseline and calculate energy savings
  + Bidders are encouraged to respond with creative/innovative ways provide energy use baseline and energy savings analysis that align with precedent for energy savings evaluation in the State of Illinois for these measure types

**Success Criteria and Metrics**

* + Bidders should detail key performance indicators in their response that include, but are not limited to, savings achieved, number of and types of facilities to participate, energy usage analysis for identifying potential customer participants, measure implementation approach, energy baseline and savings calculation approach, and a detailed strategy on how they will create awareness and cross promotion with other energy efficiency offerings.

**Applicable Measures**

* + Please see the 2026-2029 Plan (via footnote 3) Exhibit 1.1-Appendix I Part 1-5.
  + Bidders may also propose additional measures to enhance the measure life or provide high impact for customers.

**Annual Budgets and Savings Targets (participation goals)**

* + See Energy Savings and Budget Template, Exhibit 2 (Program Level Detail) containing budget, participation, and savings targets.

**Opportunities for Innovative Approaches**

* + Bidders are encouraged to provide innovative approaches to outreach, engage and provide energy savings opportunity information to commercial customers at high volume

**New or Innovative Initiatives (New or Innovative Initiatives)**

**Purpose/Description of the Initiative**

Ameren Illinois Company (AIC) seeks a third party implementation partner for innovative pilots delivering electric and/or gas energy savings to business customers, residential market rate customers, residential Income Qualified customers, previously underserved business or residential customer sectors and/or rural customers. The footnote contains initiative ideas identified by stakeholders during the Illinois Stakeholder Advisory Group (SAG) 2026-2029 portfolio planning process[[11]](#footnote-12). A third-party partner may consider pilots that incorporate concepts identified but may also consider (but not be limited to) innovative pilots implementing new measures, providing advanced customer targeting and marketing or innovative initiative delivery, or behavior modification programs. AIC seeks pilot implementer(s) that will prioritize partnerships with local businesses and local non- profit organizations and community partners (Community Based Organizations (CBO), Community Action Agency (CAA), etc.).

**Special Considerations**

* Consistent with its 2026-2029 EE Plan, Ameren has committed to not actively market on-bill financing (OBF) to IQ customers
* Continue providing energy efficiency opportunities to customers in an equitable manner, including identifying underserved customers and providing resources available to help lower utility bills
* Measures offered through the IQ initiative, whether those measures will be offered as part of a weatherization project or otherwise, shall be provided without co-pays to low-income customers as the term “low-income customers” is defined as household income at or below 200% Federal Poverty Level (“FPL”) or at or below 80% Area Median Income (“AMI”), whichever is least restrictive in terms of customer eligibility.
* Tracking of the types and quantities or volumes of insulation and air sealing materials, and their associated energy saving benefits, installed in energy efficiency programs targeted at low-income single-family and multifamily households.
* AIC will continue its practice of not requiring customers seeking to participate, or continuing to participate, in an AIC offered energy efficiency program to demonstrate, or otherwise provide evidence or documentation of, United States citizenship.
* A commitment to continue to use a workflow to determine when it is appropriate for utility-only weatherization contractors to install advanced thermostats and educate customers on the use of advanced thermostats.
* A commitment to continue its current process of reviewing applications and invoices from program allies in continued effort to prevent residents being charged for a weatherization quote.
* The Company will also analyze and, at its discretion, leverage external sources of funding health and safety improvements for initiative participants.
* Abide by Ameren's 2026-2029 Energy Efficiency Plan requirements in regard to incentivizing gas furnaces and window air conditioning units only when the following criteria is met:
  + Natural Gas Furnaces
    - The unit is no longer functioning; or
    - The unit is functioning, but is in poor condition and would be expensive to remediate; or
    - A health and safety emergency exists (i.e. carbon monoxide leak from a cracked heat exchanger); or
    - The unit is greater than 18 years old.
  + Window AC units
    - Limited to $43,200 - $75,000 annually for customers at high health risk, defined as:
      * 60 years or older; or
      * Disabled; or
      * Households with children under the age of 6
* Abide by Ameren's 2026-2029 Energy Efficiency Plan requirement to continue to require that Ameren staff and/or its subcontractors shall conduct manual J load calculations and sizing shall be based on estimated design heating loads, in circumstances when equipment/technology type is changed. (e.g. CAC replaced w/ HP)
* To the extent allowable by law, Ameren commits to not actively market to IQ customers any OBF or any financing under the Equitable Efficiency Upgrade Program of efficiency measures that such customers would be eligible to receive at no cost through Ameren’s 8-103B efficiency programs

**Target Markets by Sector, Segment and Participation Eligibility Requirements**

* Existing AIC Business or Residential electric and/or gas customers

**Success Criteria and Metrics**

* Measure cost effectiveness
* Number of customers participating
* Low cost $/kWh and $/therm savings
* Focus on long term (>10 year) savings delivery
* Customer satisfaction

**Pilot plan includes:**

* Engagement or partnerships with community partners (CBO's, CAA's, etc.)
* Utilization of small and/or local vendors
* Identification and education of customers regarding additional EE benefits from pilot (emissions reduction, etc.)

**Selection Criteria**

* Development of a pilot research plan outlining how the implementation partner will achieve the pilot objectives
* Develop and provide a finding/recommendations report
* Using criteria and metrics identified above, provide a findings/recommendations report that includes:
* Evaluation of initiative merits and transition from pilot to full-scale initiative
* Lessons learned and key insights/recommendations if pilot is selected to become part of standard portfolio offering
* Identification of potential barriers to implementation and description of solutions to address barriers

**Applicable Measures**

* AIC is open to considering measures that align with objectives outline above.

**APPENDIX B: REQUEST FOR PROPOSALS RESOURCE LIST**

Below is a list of companies that have agreed to share their information for potential partnering or subcontracting arrangements.

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **What is the name of your organization?** | **What services does your organization provide? Please limit your response to 50 words or less.** | **Is your organization headquartered in or does it primarily serve an Equity Investment Eligible Community (EIEC) as defined by the Illinois Clean Energy Jobs Act (CEJA)?** | **Does your organization currently employ residents from an EIEC or other disadvantaged communities in Illinois?** | **Is your organization certified or self-identified as a mission-driven enterprise (e.g., nonprofit, B Corp, MWBE, etc.)? If yes, please specify the certification(s) or designation(s).** |
| 360 Energy Group | The following services that 360 Energy Group offers includes program administration, retro-commissioning (RCx), new construction commissioning, industrial assessments (compressed air, process cooling, and wastewater treatment), energy assessments, codes training, waste reduction, cross program collaboration, and action plan development for decarbonization, energy reduction, sustainability, transportation electrification, etc. | Yes | Yes | No |
| AM Conservation | Wholesale Product Distribution, Kit Programs, Marketplace Programs | No | No | N/A |
| ASK Energy, Inc. | ASK Energy provides energy engineering consulting services to commercial and industrial customers. The qualifications include but not limited to SEM, RCx, custom energy project assessment, energy modeling, codes and standards, emerging technology study, M&V, data analysis, energy audits, project management. | No | No | WBE certified by WBENC |
| BA Lighting LLC dba BA Solutions | BA Solutions is a full turn key, energy efficiency solutions company offering a wide variety of energy saving and construction focused services. | No | No | Certified WBENC, Cook County/City of Chicago WBE, and BEP state of IL WBE |
| Brio | Program design, strategy, implementation, and research | No | No | Women Owned Business |
| Cascade Energy, LLC | C&I energy efficiency and decarbonization services. Demand-side management program design and implementation, project energy engineering services, strategic energy management (SEM) and retro-commissioning services, and energy performance tracking software. | No | Yes | N/A |
| CEDA | CEDA's Home Weatherization Assistance Program provides weatherization services for eligible homeowners. Weatherization services may include caulking, air-sealing, insulating, and heating system repair and replacement. | Yes | Yes | The Community and Economic Development Association of Cook County, Inc. (CEDA) is one of the largest private, nonprofit 501(c)(3) Community Action Agencies in the country, serving residents throughout Cook County, Illinois. We serve more than 300,000 people and more than 150,000 households every year. |
| Clean Slate Advocates Inc NFP | In a world where the simple pleasure of clean clothes can be a luxury for some, Clean Slate Advocates NFP (CSA) seeks to bridge the gap and bring communities together. Introducing the "From Soap To Hope Challenge" a mission to amplify the importance of hygiene and inclusivity, irrespective of socioeconomic backgrounds. | No | Yes | Nonprofit |
| CMC Energy Services | Founded 47 years ago, CMC is a certified woman-owned (WBENC) and woman-led energy-efficiency service provider offering comprehensive consulting and program management services to the energy efficiency industry. Today, CMC employs a staff of roughly 400 across 10 states – and we continue to grow. We support a full suite of services across all residential, commercial, industrial and multifamily sectors, including program design and implementation, marketing, and outreach. | Yes | Yes | WBENC |
| Copeland | The Sensi by Copeland connected thermostat is a great solution for a variety of the initiatives outlined. We look forward to working with partners to include our hardware solution and leverage additional software options like Multiple Thermostat Manager and our integration with Encycle "intelligent buildings" to save energy with HVAC. | No | Yes | Sustainability is no small ambition. That's why Copeland is built for action on a global scale. Everything we do leads to a more sustainable future. |
| Direct Agents | Digital Marketing, Paid Media Advertising (Search, Social, video/display, mobile, Connected TV, Out-of-home, audio/podcasts), Influencer Marketing, Creative Design & Media Asset Creation, SEO, Advanced Analytics | No | No | Minority Owned Business (we have the NMSDC certification) |
| Diverse Power Solutions | Program implementation, staff augmentation, program design | Yes | Yes | Yes, MWBE in state of Illinois |
| DNV Energy Services USA Inc. | DNV offers clean energy programs on behalf of utilities and local governments to help them meet the challenges of providing energy to their customers while adapting to the changing energy landscape. Currently, we implement 20+ clean energy programs, in program design, trade ally support, marketing, and education. | No | No | No |
| EcoHealth Strategies | EcoHealth Strategies provides policy strategy, community engagement, program design and data collection services | Yes | Yes | MWBE |
| Eire Direct Marketing, LLC | Experienced in electric and gas utility strategic marketing and communications; message development and testing by customer/stakeholder groups; creative content, design and production for direct mail, email, social media, video, sales tools; results analysis and contact management recommendations. | No | No | WBENC - Woman Owned Business since 2010 |
| Electric Power Engineers, LLC | EPE places particular emphasis on being an industry leader in providing a holistic approach to enable a clean energy transition and build the grid of the future. With over 350 team members, EPE has extensive experience in distribution system planning, DER integration and interconnection studies and analysis, power system modeling, distribution automation, electrification, grid modernization, advanced software solutions for energy intelligence focused on enhancing smarter grid planning and operations, and power system design. | No | Yes | No |
| Elevate Energy | Elevate Energy works to ensure everyone has access to clean and affordable heat, cooling, power, and water in their homes and communities. | Yes | No | Yes, Elevate Energy is a nonprofit corporation exempt pursuant to Section 501(c)(3) of US Internal Revenue Code. |
| EMC Insights | EMC Insights specializes in the acquisition and analysis of data to support energy efficiency program implementation. Our services include program design and development, outreach and marketing, service provider management, engineering and inspections, quality assurance, and M&V. We also provide software products to measure savings using utility smart meter data accurately. | No | No | MBE - Certified through the National Minority Supplier Development Council |
| Energy Infrastructure Partners LLC. | Energy Infrastructure Partners (EIP) delivers expert consulting in energy efficiency, electrification, and decarbonization. We support utilities and public agencies with planning, audits, financing, and community engagement. As a diverse national firm, we’re a trusted partner for delivering impactful, compliant, and equitable energy solutions across sectors. | No | No | MBE, SBE, DBE |
| Energy Sciences | Outreach, engineering, marketing, inspection for custom, prescriptive, midstream, Retro-commissioning and small business programs | No | No | WBE,DBE,WOSB |
| Energy Solutions | Energy Solution's is a electric and gas energy efficiency program implementor and administrator. | No | No | NA |
| Faith in Place | Faith in Place inspires environmental programming across Illinois at Houses of Worship. We offer energy efficiency assessments and retrofits to Houses of Worship and their members' homes, helping communities of faith save energy and lower costs. | Yes | Yes | 501c3 nonprofit |
| Franklin Energy Services | Comprehensive, integrated demand-side management solutions, design, engineering, marketing, outreach, education, customer service, and field services. | No | No | No |
| Green Home Experts LLC | Product distribution, kitting and pick and pack services. | Yes | Yes | Yes, we are WBE-certified. |
| i3 Energy, LLC | Energy consulting services and trade ally management | No | Yes | BEP Certified as a woman-owned enterprise |
| ibex.co | We provide new customer and existing customer smart home engagement platforms. | No | No | No |
| Illinois Association of Community Action Agencies | Weatherization and energy assistance training and support for Illinois Community Action Agencies | No | No | 501c3 nonprofit |
| Illinois State Black Chamber of Commerce, Inc. | The Illinois State Black Chamber of Commerce provides education and training on a variety of topics, including Ameren Energy Efficiency Programs. We also offer networking opportunities, advocacy support, and resources to empower Black-owned businesses, helping them grow, connect, and succeed in Illinois and beyond. | Yes | Yes | yes. Our organization is a 501(c)(6) organizations. |
| Inova Energy Group | Energy program design with a focus on underserved markets and customers, stakeholder engagement, customer outreach and education, workforce development | No | No | certified WBE by WBENC, certified WOSB by the SBA |
| Kambo Energy Group | Kambo Energy Group delivers community-led engagement services that help utilities increase program participation in underserved communities. Through culturally relevant outreach and trusted delivery, we boost uptake among BIPOC, Indigenous, rural, and low-income households - enabling utilities to meet equity goals, drive energy savings, and build lasting community trust. | Yes | No | Certified minority owned business with NMSDC |
| Kelliher/Samets, Ltd. (dba KSV) | Marketing and advertising | No | Yes | Yes. Bcorp, WBE |
| LED 4 Lights D/B/A ACH Lighting | Lighting Distributor | Yes | No | Self Identified as a Minority Business |
| Lincus, Incorporated | svinod@lincus.com | No | No | No |
| Logisticus Technologies LLC | Jan San, MRO, Office Furniture, Office supplies, Breakroom and food serving supplies, Mats, Energy saving and energy testing supplies | No | No | Mission Driven |
| LUZCO Technologies LLC | LUZCO delivers expert solutions in transmission, distribution, and substation engineering, including line design, fiber upgrades, DER integration, and voltage optimization. We support utility standards, NERC/NESC compliance, SCADA, protection schemes, and relay upgrades. Our program delivery team excels in project management, scheduling, data analytics, and construction support from concept to completion. | Yes | Yes | MBE, WBE |
| Midwest Energy Efficiency Alliance | Energy Efficiency related research, stakeholder engagement, trainings, and market transformation initiatives. We serve all areas of the state, including EIECs. | No | No | 501c3 non-profit |
| National Energy Foundation | NEF has been the school kits implementation contractor since 2016. We also provide the High School Innovation program, and support the MDI Internship program as well. NEF's focus is K-12 energy education. | No | No | Yes, NEF is a 501(c)(3) Foundation |
| Perfect Impressions Inc. | Vehicle Graphics / Signage / Trade Show Displays | No | No | No |
| Performance Systems Development | Program Implementation, Program QA, Training (Program Allies), Software, Heat Pump Toolkit | No | Yes | Women's Business Enterprise National Council (WBENC) certified Women's Business Enterprise (WBE), SBC with SBIR.gov |
| Power TakeOff | VCx, vSEM, Energy Reports, Utility Intelligence Software Platform | No | No | Not certified. |
| Primera Engineers, Ltd. | Energy services: EE consulting, program implementation, RCx, data analytics, application processing | Yes | Yes | WBENC |
| Recurve Analytics, Inc. | Recurve connects the dots between efficiency, electrification, renewable energy, demand management, and DERs. We create transparent methods and software to revolutionize the way energy is measured, deployed and procured. Recurve's pioneering FLEX platform provides leading utilities, implementers, regulators, and aggregators with a secure, scalable solution. | No | No | No |
| Richards Graphic Communications, Inc. | Richards is a full-service resource for asset management, offset printing, digital imaging, fulfillment, inventory management, mailing, and distribution. We have a custom ordering site for the Ameren team and their partners/ contractors. | Yes | Yes | WBE, HITRUST certified |
| SEEL, LLC | SEEL’s services include comprehensive program delivery support, call center services, sub-contractor management, outreach and marketing, workforce development, training, and data analytics. Our expertise spans residential programs for market-rate and low-income customers, small business, commercial sectors, rebate processing, appliance recycling, and trade ally development. | No | Yes | Minority Business Enterprise (MBE) |
| Shelton Solutions, Inc. | Energy Management Consulting - Energy Program Staff Augmentation - Energy Efficiency Application Quality Assurance/Quality Control - Energy Efficiency Program Community Outreach | Yes | Yes | MWBE |
| Skytop Consulting LLC | Skytop Consulting provides energy efficiency program design, evaluation, and implementation support for programs and pilots. | No | No | No |
| The JPI Group LLC | Delivering Energy Efficiency Projects with Expert Local Teams; Empowering Trade Allies & Small Businesses in the Energy & Utility Sector; Solving Workforce Gaps with Data-Driven Hiring & Training Solutions; Helping Utilities Achieve Energy Efficiency, Therm Savings & Carbon Reduction Goals | Yes | Yes | Yes, we are a MBE, WBE, and WOSB certified nationally. For Illinois, we have our MWBE through BEP and DBE for City of Chicago. |
| The Will Group | Project Management, Professional Services, Energy Efficiency, Construction Management, Land Acquisition and Surveying, GIS Mapping, LED Supply and Manufacturing | Yes | Yes | MBE |
| Unrooz Solutions | Unrooz Solutions helps clients turn their goals into impact by centering community voices through participatory research, design, strategy, and policy development. | No | No | WBE certified and self-identified as a woman-minority-owned business |
| Uplight | Online retail Marketplaces, with incentives available at point of purchase, serving both market rate and low-income customers. | No | No | Yes - B Corp certified |
| Walker-Miller Energy Services | We are a diverse, woman-owned energy services company that specializes in four core verticals: EE Program Implementation, EV Infrastructure, Medium & High Voltage Equipment Sales, and Workforce Development & Training (MDI). | Yes | Yes | Yes: B-Corp, MWBE, WBE, ISO 27001 Certified, SOC2 Type 2, Building Performance Institute Certified BPI Testing Center, US DOE Home Energy Score Partner |

1. Section 8-103B(g)(4). [↑](#footnote-ref-2)
2. AIC’s Plan comprises of a Residential Program and a Business Program, each of which include “initiatives” made up of select measures. While the Third-Party Program will be bid and reviewed as a separate “program” of AIC’s Plan, it is anticipated to be implemented in a manner that is integrated within existing initiatives and in compliance with achievement of the savings goals as approved by the ICC. [↑](#footnote-ref-3)
3. See <https://www.icc.illinois.gov/docket/P2025-0211/documents> for the 2026-2029 Plan that includes detailed initiative descriptions in Appendix H of Exhibit 1.1 [↑](#footnote-ref-4)
4. The Total Resource Cost test adopted by Section 8-103B(a) of the Act is set forth in the Illinois Power Agency Act, 20 ILCS 3855/1-10. [↑](#footnote-ref-5)
5. The Public Utilities Act defines low income customers as “households at or below 80% of area median income”

   (220 ILCS 5/8-103B(c)). [↑](#footnote-ref-6)
6. <https://www.ilsag.info/wp-content/uploads/IL_EE_Policy_Manual_Version_3.0_Final_11-3-2023.pdf> [↑](#footnote-ref-7)
7. The Public Utilities Act defines low income customers as “households at or below 80% of area median income”

   (220 ILCS 5/8-103B(c)). [↑](#footnote-ref-8)
8. See [AIC-2025-NTGR-Recommendations-for-SAG-FINAL-2024-10-01.xlsx](https://view.officeapps.live.com/op/view.aspx?src=https%3A%2F%2Fwww.ilsag.info%2Fwp-content%2Fuploads%2FAIC-2025-NTGR-Recommendations-for-SAG-FINAL-2024-10-01.xlsx&wdOrigin=BROWSELINK) for the most recent approved values for Ameren Illinois 2025 energy efficiency programs [↑](#footnote-ref-9)
9. [Illinois Statewide Technical Reference Manual Version 13.0 - Illinois Energy Efficiency Stakeholder Advisory GroupIllinois Energy Efficiency Stakeholder Advisory Group](https://www.ilsag.info/illinois-statewide-technical-reference-manual-version-13-0/) [↑](#footnote-ref-10)
10. [https://www.icc.illinois.gov/docket/P2025-0211/documents/362031/files/634034.pdf](https://nam11.safelinks.protection.outlook.com/?url=https%3A%2F%2Fwww.icc.illinois.gov%2Fdocket%2FP2025-0211%2Fdocuments%2F362031%2Ffiles%2F634034.pdf&data=05%7C02%7Cjosh.lind%40cadmusgroup.com%7C1fd3ec8f20d649f6311d08dd7d1ab8ae%7C9775d500e49b49a79e241ada087be6ee%7C0%7C0%7C638804276196605608%7CUnknown%7CTWFpbGZsb3d8eyJFbXB0eU1hcGkiOnRydWUsIlYiOiIwLjAuMDAwMCIsIlAiOiJXaW4zMiIsIkFOIjoiTWFpbCIsIldUIjoyfQ%3D%3D%7C0%7C%7C%7C&sdata=LTzIAnNyRMyNs%2BsHkMU7XQrzOihaB8ZxEhQkOA6yHjs%3D&reserved=0) [↑](#footnote-ref-11)
11. [2024 Energy Efficiency Ideas - Illinois Energy Efficiency Stakeholder Advisory GroupIllinois Energy Efficiency Stakeholder Advisory Group](https://www.ilsag.info/2024-energy-efficiency-ideas/)  [↑](#footnote-ref-12)