

A circular logo with the number '75' in a large, light blue font and the word 'Indoor' in a smaller, dark blue font below it. The background of the logo is a light blue gradient. The overall background of the slide features a stylized illustration of a person with dark skin and hair, wearing a patterned headband and a teal shirt, holding a book. The background is decorated with colorful stars and hearts in shades of yellow, orange, red, and purple.

75
Indoor

Ameren Illinois Diverse Procurement Market Development Initiative

Presentation to the Illinois Stakeholder Advisory Group

December 13, 2023

Agenda



- **Introductions**
- **Overview of Diverse Procurement Market Development Initiative**
 - Purpose
 - Challenges
 - Strategies
 - The Encolor Process
- **High Level Results**
 - MDI Assessment RFP
 - Smart Savers RFQ
 - Healthier Homes RFP
- **Lessons Learned**
- **Wrap Up and Questions**

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Introductions



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**Quinn Parker, CEO
ENCOLOR**



**Jill Steiner, Founder
Saldo Research**



**Nicolas Lovier, Manager
Strategy and Innovation
Ameren Illinois**

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Initiative Overview



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Ameren IL Diverse Procurement Market Development Initiative



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Purpose

Increase awareness, engagement, participation and success of diverse businesses throughout the Ameren IL procurement process. In addition, this initiative supports the 2022-205 EE Plan Stipulation Agreement to bring forth innovative initiatives and increased participation by diverse vendors, potentially offering new approaches to historically underserved markets currently being targeted by utility programs.

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Small/Diverse Business Procurement Challenges



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Barriers in the Procurement Process

- **Lack of awareness**
 - Unless they have a relationship with the utility or a prime implementer, small and diverse businesses are unaware of the opportunities available to them.
- **Lack of engagement and relationships**
 - Businesses often do not have access to decisions makers. They are unable to build relationships with buyers.
- **Limited ability to participate**
 - Often small and diverse business aren't invited to compete, or they encounter real or perceived barriers.
- **Real or perceived inability to compete with larger organizations**
 - Businesses will self-select out of the process if they don't think they can meet technical and performance requirements or compete with established firms.

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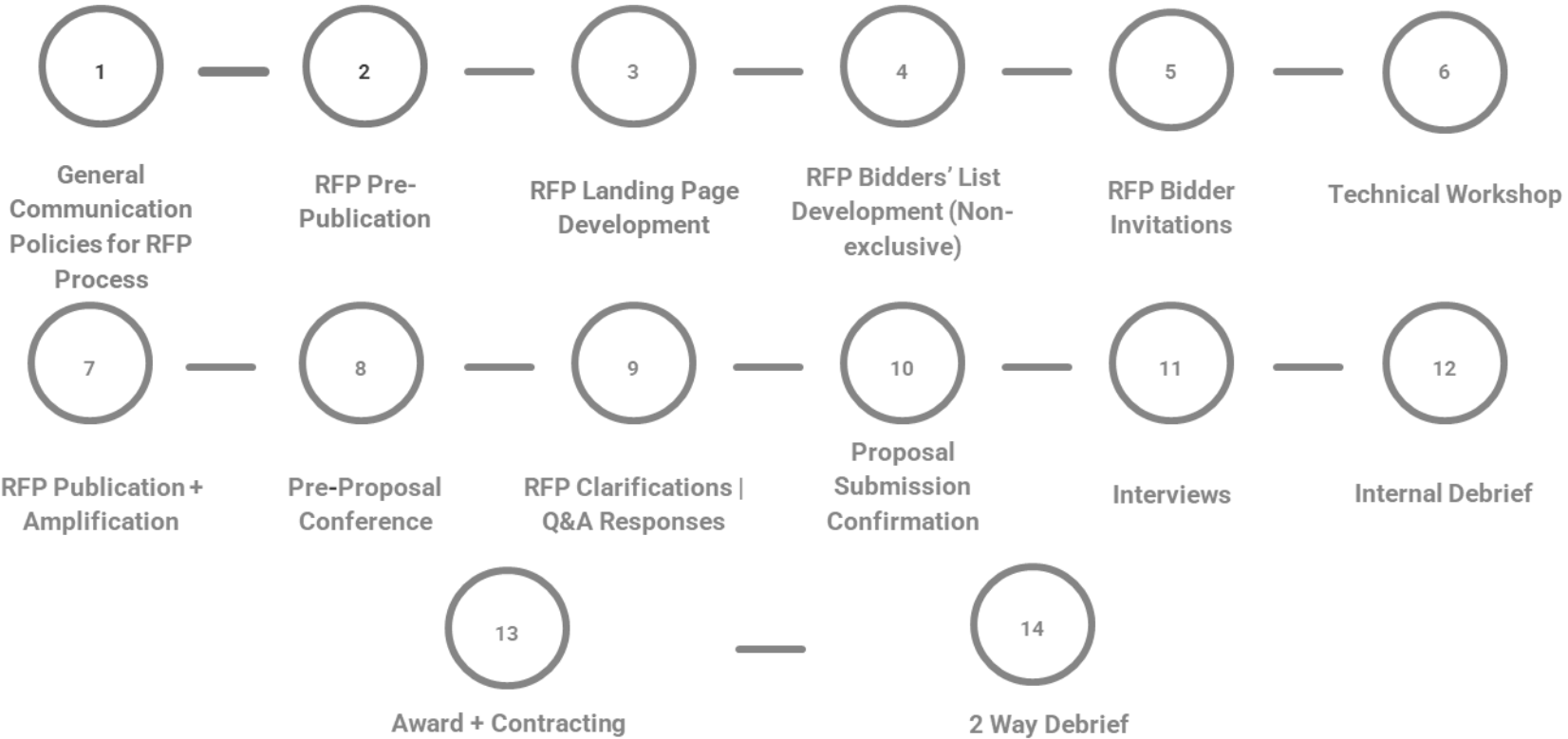
Strategies to Mitigate Barriers



- **Lack of awareness**
 - Publicly promote the opportunity outside of our typical channels
 - Engage with internal and external stakeholders
- **Increase engagement**
 - Provide opportunities to engage with Ameren staff
 - Create a dedicated webpage and email for engagement
- **Limited ability to participate**
 - Remove closed bidders list
 - Provide information to help alleviate participation concerns
- **Lack of ability to compete**
 - Intentional procurement process with clear requirements
 - Multi-criteria evaluation of proposals
 - Conduct technical training to provide best practices on proposal development and submissions

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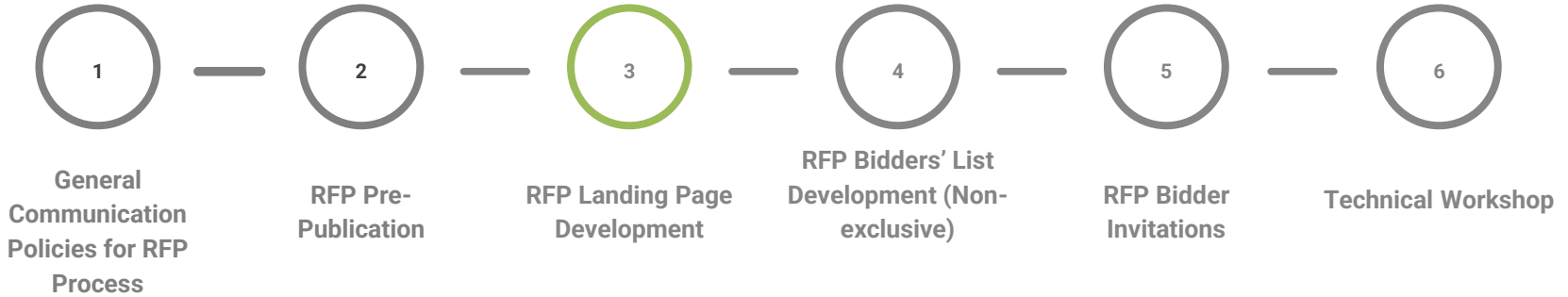
Stage Gates + Actions: The Encolor Process



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Stage Gates + Actions: Landing Page

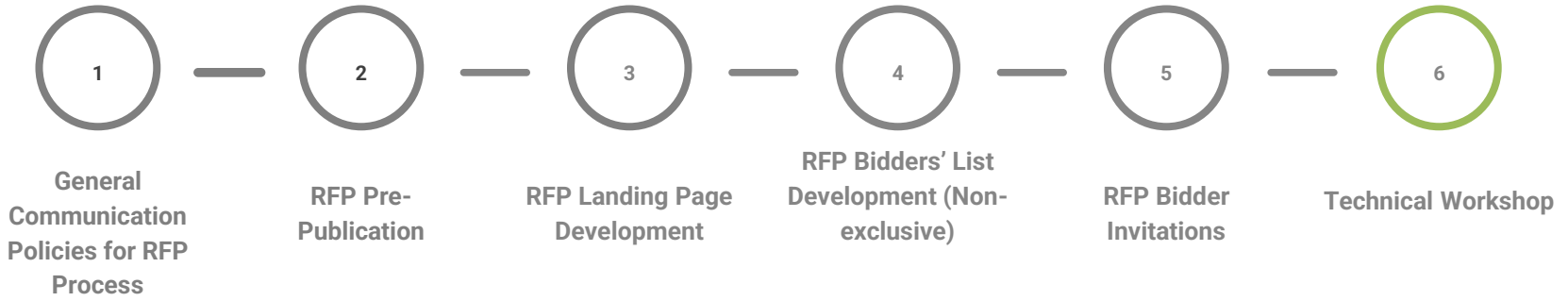


Potential bidders could easily access all critical information, including:

- Request for Proposal documents
- Program Background
- Bidder's Conference Call Presentation
- Proposal Templates
- CyberSecurity Requirements
- And much more.

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Stage Gates + Actions: Technical Workshop



CALLING ALL DIVERSE VENDORS!

UTILITY RFP BEST PRACTICES TECHNICAL WORKSHOP OCTOBER 20th, 2-3p.m. CST

This session will feature Ameren Illinois managers and procurement specialists who will review upcoming RFPs and RFQs and how diverse vendors can participate in these projects. You will gain a better understanding of which projects match your firm's capabilities and how to build a relationship for new work at Ameren Illinois as either a prime contractor or as a subcontractor.

Hear from Ameren professionals who will overview opportunities in three key areas:

- Utility Procurement Processes
- RFP Best Practices
- Ameren Illinois RFQ and RFP Practices

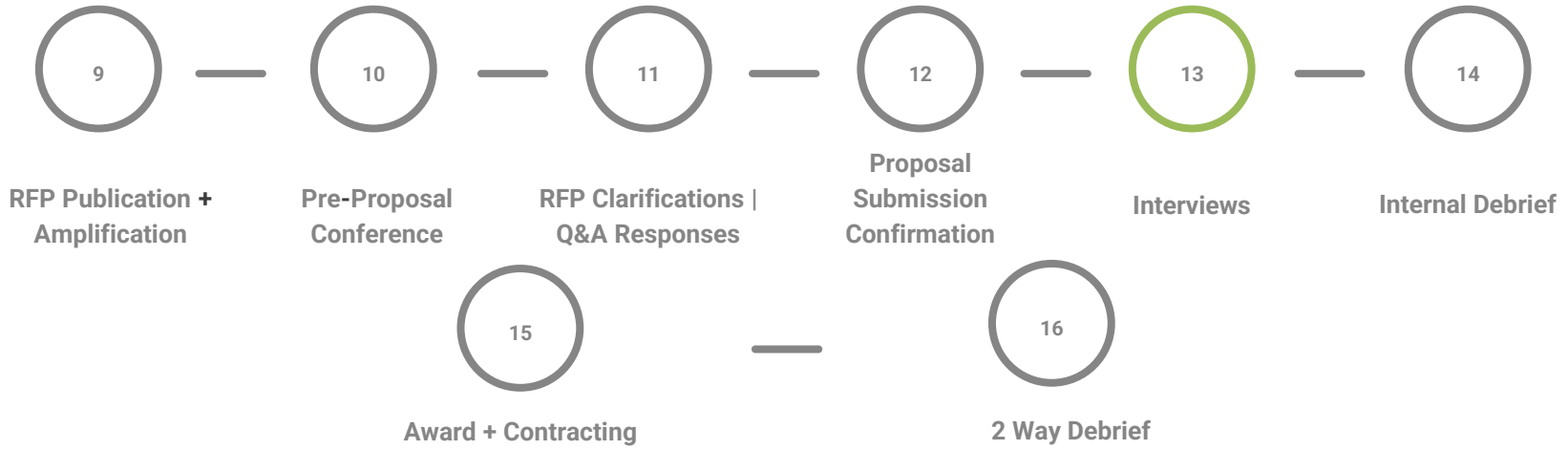
These workshops were intended to help support all organizations better understand how to engage with utilities. However, many of the best practices were intentionally related to challenges experienced by small and diverse businesses.

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Stage Gates + Actions: Interviews



Small and diverse businesses tend to have limited resources or experience with proposal development. This may result in written proposals that do not completely showcase their capabilities. A lesson learned is to invite all bidders with technically qualified proposals to an interview.



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High Level Results



Opportunity	MDI Assessment RFP	Smart Savers RFQ	Healthier Homes RFP
Response	<ul style="list-style-type: none"> • Received five proposals • Three teams were invited to interview • A diverse led team was selected, no previous relationship with Ameren IL EE team 	<ul style="list-style-type: none"> • Received two proposals • Both teams were invited to interview • Contractor with a current relationship with Ameren IL EE program was selected 	<ul style="list-style-type: none"> • Received four proposals • All teams were invited to interview • A diverse led team was selected, no previous relationship with Ameren IL EE team
Key Takeaway	<p><i>Q&A throughout the process supports higher quality proposals</i></p>	<p><i>Interviews allow small businesses the opportunity to showcase their knowledge and approach</i></p>	<p><i>Small business collaborations provide innovative solutions</i></p>

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Lessons Learned



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Lessons Learned



Recommendations to Ensure a More Diverse Vendor Pool

- **Publicly promote RFPs**
 - Post RFPs on public industry websites, such as AESP and MEEA, and beyond
 - Share RFPs with community partners, request distribution
 - Develop a dedicated webpage where information is easily accessible
- **Write clear and concise RFPs**
 - Provide potential bidders with as much information as possible, including the budget
 - Require bidders to provide just the information necessary to select the bidder that will best serve utilities, stakeholders, and customers
- **Implement an inclusive process**
 - Issue an Intent to Release
 - Provide as much time as possible to respond while meeting deadlines
 - Keep Q&A open until the submissions are due
 - Make sure the submission process is easy to navigate
- **Interviews are important**
 - Allow businesses that are technically qualified, but less experienced with writing formal proposals, the opportunity to showcase their capabilities in an interview

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Questions and Answers



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Discussion Questions



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- **What additional barriers to diverse and small business participation in utility RFQs or RFPs do you see?**
- **Are there additional activities to addressing barriers faced by diverse and small businesses that you recommend?**
- **What other efforts to expand opportunities for small and diverse businesses could Ameren IL leverage or collaborate with?**

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