**REQUEST FOR QUALIFICATIONS FOR   
SMALL BUSINESS EFFICIENCY PROGRAM SERVICES**

**SECTION I: INTRODUCTION**

Ameren Missouri requests a written Statement of Qualifications (SOQ) from firms interested in participating as a Small Business Direct install (SBDI Service Provider. This program will require selected SBDI Service Providers to perform assessment and installation of energy efficient equipment in non-residential Ameren Missouri electric customers facilities that are billed on a small business 2(M) general service rate. Lockheed Martin Energy (LM Energy) will be the Program Administrator for the Small Business Direct Install (SBDI) Efficiency Program as part of the Ameren Missouri ***BizSavers®*** Energy Efficiency Programs.

Firms responding to this Request for Qualifications (RFQ) that meet all Program qualifications will be considered to participate as one of Ameren Missouri’s list of qualified SBDI Service Providers. After review of submitted SOQ’s a selection will be made to participate in the SBDI program. The Program will provide an assessment tool and incentive application tool which all selected contractors are required to utilize to complete site assessments and receive incentives. The Program will also provide training on the processes, tools, measures and requirements for the SBDI Program. Program staff will conduct inspections to ensure that the work was performed in compliance with program guidelines. Qualified firms may receive additional support in the form of marketing materials and project leads.

The Small Business Direct Install Program is designed to help customers with facilities that are billed on an Ameren Missouri non-residential, 2(M) general service rate identify energy saving opportunities at their facilities through assessments and realized energy savings at a reduced cost through the use of utility incentives. Targeted facilities will include all business types that receive Ameren Missouri electric service at a 2(M) general service rate. In addition to incentives specifically designed for small businesses, customers will have access to the entire portfolio of Ameren Missouri non-residential incentives including Custom, Standard, Retro-commissioning and New Construction Incentives.

The Program’s approach is to use a small group of highly focused SBDI Program Service Providers in order to identify and implement cost-effective energy savings measures, and provide small business owners information on additional Ameren Missouri ***BizSavers*** incentives. The Program will encourage the use of special small business incentives designed to reduce the upfront costs required to complete energy saving lighting retrofits. The Program is also intended to create additional energy awareness within small businesses and promote energy use reduction as an avenue to reduce costs, increase margins and stay competitive.

Only fully qualified Trade Allies that become selected SBDI Service Providers will be approved to deliver Small Business Direct Install Program services. The recruitment and training process for approved SBDI Service Providers is outlined below.

* Potential SBDI Program Service Providers must be a member in good standing of the ***BizSavers*** Trade Ally Network.
* Potential SBDI Service Providers must respond to this RFQ to ensure qualifications are met.
* Potential SBDI Service Providers have a proactive sales team.
* Existing small business clients in the Ameren Missouri service territory.
* Experience with lighting technologies and familiarity with non-lighting energy efficiency opportunities.
* Willingness to complete walk through equipment inventory assessments.
* Experience and/or clients in remote areas of the Ameren Missouri service territory.
* Commitment to follow up on customer project inquiries provided from the Program staff.
* Established local office(s) in Ameren Missouri sales territory.
* Selected SBDI Service Providers will participate in all of the following training activities:
* **Initial Training** – mandatory for all SBDI Program Service Providers. The initial training will cover program requirements, procedures and protocols, incentives, participation processes, and other details needed to implement energy savings measures. All personnel within the selected organization participating in effort is required to attend this training. This includes sales, assessment, installation, and administrative personnel. All new staff is required to complete the initial training prior to performing work under the SBDI Program.
* **Supplemental Training** – conducted as needed, upon request, or for SBDI Program Service Providers that are deemed in need of further training.

**SECTION II: SCOPE OF WORK**

**Facility Identification and Engagement**

The SBDI Program Service Providers identify small businesses that could benefit from the reduction of energy use associated with lighting retrofits. They should also identify additional lighting and non-lighting energy savings opportunities that could receive incentives via other programs within the ***BizSavers*** portfolio. An assessment tool will be provided to quickly review and record equipment inventory within a facility. The assessment is required as part of the application for SBDI Program incentives.

**Measure Implementation**

The SBDI Program Service Providers will support the implementation of measures by either implementing directly or utilizing a qualified installer to complete installations. The installation can include small business measures, other measures within the ***BizSavers*** portfolio, or other non-incentivized measures. All measures must be installed and operational in the quantities shown on the application before any incentives are paid. Only measures that qualify for incentives under the program are eligible to receive an incentive.

**Site Surveys & Inspections**

Small Business Direct Install projects are subject to site surveys and inspections upon completion. The Program reserves the right to deny an incentive payment for work found to be unsatisfactory. Any inspection found unsatisfactory can result in the removal as a Program Service Provider from the Small Business Direct Install Program. Program staff will conduct inspections to ensure that the work was performed in compliance with program guidelines.

**Incentive Structure**

The SBDI Program incentives are prescriptive in nature and will be paid on a one-for-one unit replacement basis at the current program rates. Incentives are capped at 100% of documented assessment and measure implementation costs. Measures incentivized through the SBDI program incentive rates are also capped at $2,500 per site for the program duration. Participants will have 30 days from installation of measures to submit the incentive application and all appropriate supporting documentation.

**Incurred Costs**

The Program is not responsible for costs incurred by any respondent to this RFQ. Once submitted, proposals will not be returned to respondents. The Program reserves the right to reject any or all responses to this RFQ.

**No Guarantee of Work**

The acceptance of a firm’s SOQ does not guarantee work.

The final decision will be made by the Program Administrator on its sole and absolute discretion.

**SECTION III: SCHEDULE**

|  |  |
| --- | --- |
| **RFQ Schedule­** | |
| **July 15** | RFQ issued |
| **July 20** | Submit questions to kristin.m.mckee@lmco.com by 3:00 p.m. |
| **July 22** | Answers to questions distributed |
| **August 5** | Proposals due by 5:00 p.m. CDT (no late entries will be accepted) |
| **August 12** | Successful candidates notified |
| **August 15-30** | SBDI Program Orientation (required) |

**SECTION IV: SUBMITTAL**

Firms should submit an electronic copy of their SOQ to BizSavers@ameren.com

Questions regarding this RFQ can be directed to Kristin McKee, 314.898.1148 or kristin.m.mckee@lmco.com

**APPENDIX A: STATEMENT OF QUALIFICATIONS (SOQ)**

**Service Provider Information**

|  |  |
| --- | --- |
| **Company** | Click here to enter text. |
| **Address** | Click here to enter text. |
| **City, State, Zip** | Click here to enter text. |
| **Contact Name** | Click here to enter text. |
| **Contact Title** | Click here to enter text. |
| **Contact Phone** | Click here to enter text. |
| **Contact Fax** | Click here to enter text. |
| **Contact Email** | Click here to enter text. |

What percentage of your business is currently performed in Missouri? Click here to enter text.

What percentage of your business currently comes from small businesses (less than 100 employees)? Click here to enter text.

Please list your total number of employees in Missouri based on the following categories:

|  |  |
| --- | --- |
| **Business Category** | **Total Number Employees** |
| Sales | Click here to enter text. |
| Installation | Click here to enter text. |
| Service | Click here to enter text. |
| Management / Admin | Click here to enter text. |

What types of lighting equipment retrofits do you specialize in?

Click here to enter text.

What brands of equipment do you typically sell?

Click here to enter text.

What percent of the products you sell are on the Design Lights Consortium (DLC), Consortium for Energy Efficiency (CEE), or Energy Star qualified product lists?

Click here to enter text.

Do your products carry any other certifications? If yes, which do they carry?

Click here to enter text.

Do you complete all your installations using in-house resources? No  Yes

If not, please complete the installation contractor information below. Provide proof of insurance for all installation contractors if they are not registered Ameren Missouri Trade Allies.

**INSTALLATION CONTRACTOR 1**

|  |  |
| --- | --- |
| **Company** | Click here to enter text. |
| **Address** | Click here to enter text. |
| **City, State, Zip** | Click here to enter text. |
| **Contact Name** | Click here to enter text. |
| **Contact Title** | Click here to enter text. |
| **Contact Phone** | Click here to enter text. |
| **Contact Fax** | Click here to enter text. |
| **Contact Email** | Click here to enter text. |
| **Length of relationship** | Click here to enter text. |
| **Ameren Missouri Trade ally?** | Click here to enter text. |

**INSTALLATION CONTRACTOR 2**

|  |  |
| --- | --- |
| **Company** | Click here to enter text. |
| **Address** | Click here to enter text. |
| **City, State, Zip** | Click here to enter text. |
| **Contact Name** | Click here to enter text. |
| **Contact Title** | Click here to enter text. |
| **Contact Phone** | Click here to enter text. |
| **Contact Fax** | Click here to enter text. |
| **Contact Email** | Click here to enter text. |
| **Length of relationship** | Click here to enter text. |
| **Ameren Missouri Trade ally?** | Click here to enter text. |

***Please list any additional installation contractor information on a separate page.***

What type of warranty do you typically offer on your products?

Click here to enter text.

What type of warranty do you typically offer on your labor/workmanship?

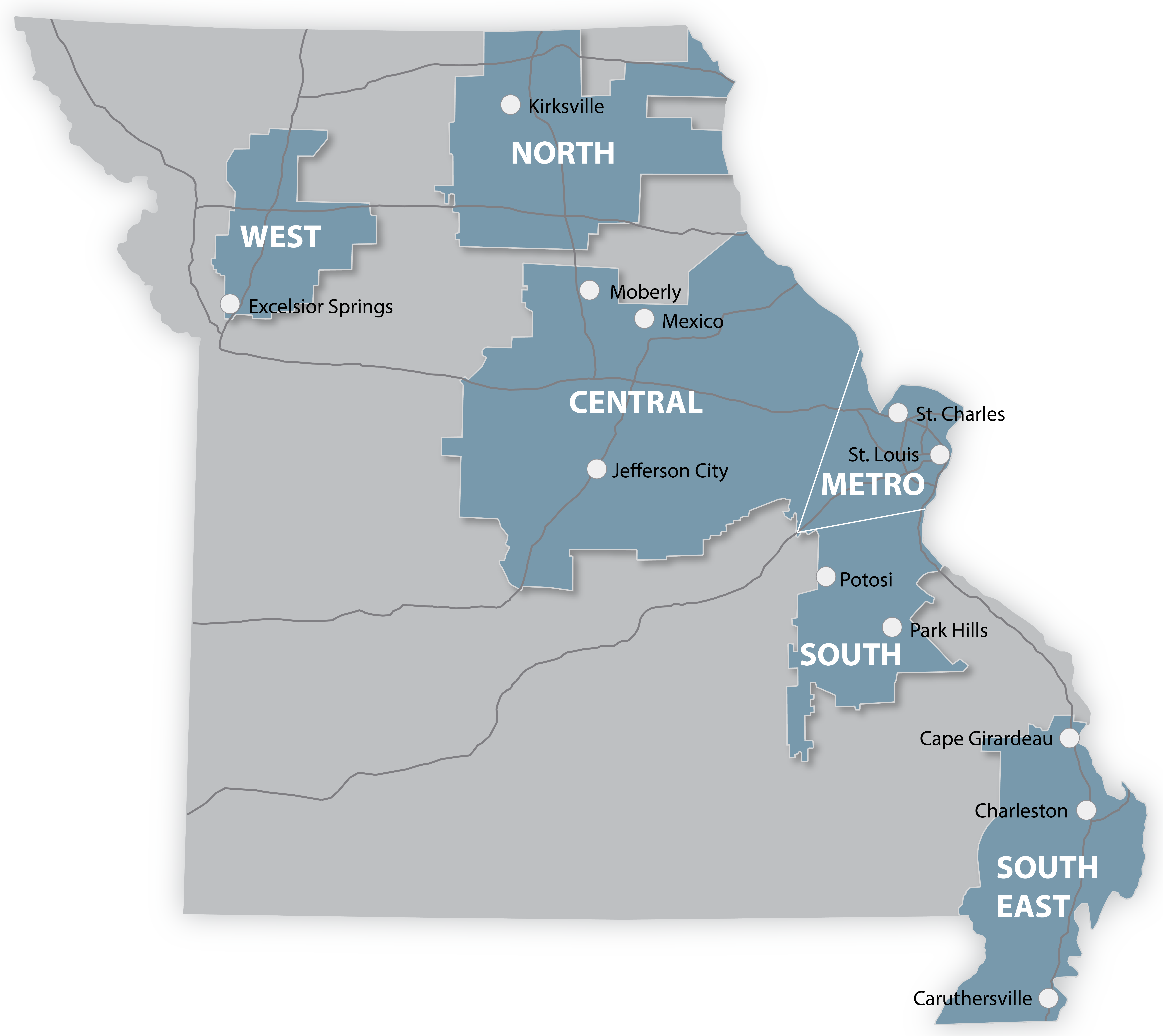
Click here to enter text.

**Regional Service Area**

In order to assure complete coverage of the entire Ameren Missouri service territory, we would like to understand more about where your business has enjoyed past success and where you would like to work in the future. All information submitted is strictly confidential and are utilized solely to provide customer access to the SBDI Program.

Please describe your regional preferences by placing a check in the regions that describe your current business.

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
|  | **Metro** | **South** | **South East** | **Central** | **North** | **West** |
| **The majority of my business’s sales came from the following region in the past year (check one)** |  |  |  |  |  |  |
| **My business has done work in the following areas during the past year (check all the apply)** |  |  |  |  |  |  |
| **My business has one or more local sales reps or installers in this area (check all the apply)** |  |  |  |  |  |  |
| **My business actively pursues additional work in this region (check all that apply)** |  |  |  |  |  |  |
| **My business would complete a job in this region with a total value of $1000 (check all that apply)** |  |  |  |  |  |  |
| **My business would complete a job or a set of jobs in this region with a total value of $5000 (check all that apply)** |  |  |  |  |  |  |
| **My business would complete a job or a set of jobs in this region with a total value of $10,000 (check all that apply)** |  |  |  |  |  |  |

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**Additional Comments**

Use this page to document any additional information you wish to include regarding your qualifications or experience doing this type of work.

Click here to enter text.

**APPENDIX B: SMALL BUSINESS DIRECT INSTALL INCENTIVES**

# Interior Lighting: Standard (A-Series) Lamp Replacements

|  |  |  |  |
| --- | --- | --- | --- |
| **Existing Equipment** | **Efficient Equipment** | **Unit** | **Incentive Per Unit** |
| Incandescent 40-60 watts\* | LED ≤ 11 watts | Lamp | $8 |
| Incandescent 75-100 watts\* | LED 7 - 20 watts | Lamp | $10 |

*\* Halogen equivalent wattage will be used as the base wattage to calculate energy savings.*

Interior Lighting: Reflector Lamp or Fixture Replacements

|  |  |  |  |
| --- | --- | --- | --- |
| **Existing Equipment** | **Efficient Equipment** | **Unit** | **Incentive Per Unit** |
| Halogen MR-16 35-50 watts | LED ≤ 13 watts | Lamp or Fixture | $16 |
| Incandescent or Halogen BR/R\* | LED ≤ 14 watts | Lamp or Fixture | $17 |
| Incandescent or Halogen PAR\* | LED ≤ 20 watts | Lamp or Fixture | $22 |

*\* Halogen equivalent wattage will be used as the base wattage to calculate energy savings.*

Interior Lighting: HID Lamp or Fixture Replacements

|  |  |  |  |
| --- | --- | --- | --- |
| **Existing Equipment** | **Efficient Equipment** | **Unit** | **Incentive Per Unit** |
| HID 100-175 watts | LED ≤ 80 watts | Lamp or Fixture | $80 |
| HID 176-300 watts | LED 62 – 130 watts | Lamp or Fixture | $100 |
| HID 301-500 watts | LED 85 - 225 watts | Lamp or Fixture | $180 |

Interior Lighting: Linear Fluorescent Replacements

|  |  |  |  |
| --- | --- | --- | --- |
| **Existing Equipment** | **Efficient Equipment** | **Unit** | **Incentive** |
| Standard Fluorescent T8 | Efficient Fluorescent T8 ≤ 7 watts per linear foot | Lamp or Fixture | $0.70 / Linear Foot |
| Fluorescent T12 | Efficient Fluorescent T8 ≤ 7 watts per linear foot | Lamp or Fixture | $1.50 / Linear Foot |
| Fluorescent T8 | Linear LED ≤ 5.5 watts per linear foot | Lamp | $1.60 / Linear Foot |
| Fluorescent T12 | Linear LED ≤ 5.5 watts per linear foot | Lamp | $2.60 / Linear Foot |

## Existing Equipment Examples Notes:

Standard Fluorescent T8 – 4ft lamp = 32w 1. Consider U-Shaped fluorescent lamps as 4 linear feet

Efficient Fluorescent T8 – 4ft lamp = 25/28w 2. For linear fluorescent to LED fixtures use the Custom program.

Fluorescent T12 – 4ft lamp = 34/40w 3. Incentives are based on the efficient equipment linear feet.

\*4ft lamps are used as an example only.

# Exterior 24/7 or Garage 24/7 Lighting: HID Lamp or Fixture Replacements

|  |  |  |  |
| --- | --- | --- | --- |
| **Existing Equipment** | **Efficient Equipment** | **Unit** | **Incentive Per Unit** |
| HID 100-175 watts | LED ≤ 80 watts | Lamp or Fixture | $135 |
| HID 176-300 watts | LED 62 - 130 watts | Lamp or Fixture | $180 |
| HID 301-500 watts | LED 85 - 225 watts | Lamp or Fixture | $250 |

Exit Sign Replacements

|  |  |  |  |
| --- | --- | --- | --- |
| **Existing Equipment** | **Efficient Equipment** | **Unit** | **Incentive Per Unit** |
| Incandescent Exit Sign | LED or Electroluminescent (ELD) | Sign | $25 |
| CFL Exit Sign | LED or Electroluminescent (ELD) | Sign | $25 |

Occupancy Sensors (No existing sensors installed)

|  |  |  |  |
| --- | --- | --- | --- |
| **Efficient Equipment** | **Watts Controlled** | **Unit** | **Incentive Per Unit** |
| Fixture Mounted Sensor | Controlling 50 - 200 watts | Sensor | $14 |
| Fixture Mounted Sensor | Controlling 201 - 500 watts | Sensor | $44 |
| Lighting Circuit Sensor (Single Technology) | Controlling 50 - 120 watts | Sensor | $20 |
| Lighting Circuit Sensor (Single Technology) | Controlling > 120 watts | Sensor | $50 |
| Lighting Circuit Sensor (Dual Technology) | Controlling > 150 watts | Sensor | $65 |