



ELEVATE

Equity through climate action

Energy Efficiency and Electrification One Stop Shop Program Design and Implementation

Request for Qualifications (RFQ)

JUNE 2, 2025

SUBMITTED TO: Village of Oak Park





ELEVATE

773-269-4037
ElevateNP.org

322 S. Green St.
Suite 300
Chicago, IL 60607

June 2, 2025

Attn: Lindsey Roland Nieratka
Chief Sustainability Officer
Village of Oak Park
123 Madison Street
Oak Park, IL 60302
Submitted by email: Sustainability@oak-park.us

Dear Village of Oak Park team:

Elevate Energy (Elevate) is pleased to respond to the Village of Oak Park's Request for Qualifications (RFQ) issued on May 5, 2025, for an Energy Efficiency and Electrification One-Stop Shop.

For 24 years, Elevate has worked to create a just and equitable world in which everyone has clean and affordable heat, power, and water in their homes and communities. We design and implement energy efficiency, solar, building decarbonization, clean water, and workforce development programs that reduce costs, protect people and the environment, and ensure the benefits of clean and efficient energy use reach those who need them most. Elevate agrees to be bound to the terms, conditions and specifications of the RFQ.

If you have any questions regarding the information presented in this proposal, please contact Jasmine Carr, Director of Government Partnerships, at 773-831-9392 or development@elevatenp.org.

Thank you for the opportunity to submit our qualifications.

Sincerely,

Antonia Ornelas
Chief Program Officer
Elevate Energy

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Background

Mission Statement

Elevate collaborates with partners to research, design, and implement clean energy and clean water programs that promote healthy, just, and financially sustainable communities.

Vision Statement

Elevate seeks to create a world in which everyone has clean and affordable heat, cooling, power, and water in their homes and communities – prioritizing frontline communities. In doing so, we will significantly mitigate the climate crisis and improve the health of communities.

Organizational Description

Elevate Energy (Elevate) is a 501(c)(3) nonprofit organization dedicated to equity through climate action. Since 2000, Elevate has worked to create a just and equitable world in which everyone has clean and affordable heat, cooling, power, and water in their homes and communities – prioritizing frontline communities. Elevate collaborates with partners to research, design, and implement clean energy and clean water programs that promote healthy, just, and financially sustainable communities. Elevate is based in Chicago and works nationally.

Organizational History

Elevate was founded in 2000 as Community Energy Cooperative, an outgrowth of the Center for Neighborhood Technology (CNT). With CNT, we designed dynamic energy pricing models and implemented energy efficiency programs serving multifamily building owners. Over the last 25 years, Elevate has grown nationally and expanded to serve communities beyond energy efficiency, through solar, water, environmental health, workforce development, and building electrification programs. Elevate collaborates with partners to research, design, and implement clean energy and clean water programs that promote healthy, just, and financially sustainable communities. Elevate is headquartered in Chicago and works nationally in seven satellite offices in Seattle, WA, Portland, OR, Madison, WI, Kansas City, MO, Springfield, IL, East Lansing, MI and Detroit, MI. Today Elevate has 265 employees across the U.S., and we continue working toward building sustainable, resilient communities nationwide. As Elevate looks toward the future, we are using our years of experience to identify solutions that help create safe and healthy housing for all communities.

Elevate's Department of Finance is responsible for developing, implementing and monitoring effective financial internal controls as well as ensuring compliance with financially relevant laws and regulations. Elevate's financial statements are prepared in conformity with accounting principles generally accepted in the United States of America and audited annually by an independent auditor. Policies are in place surrounding key areas such as purchasing, travel, and grant procurement. Additionally, standard operating procedures are in place surrounding

financial areas such as a general ledger, chart of accounts, revenue recognition, reconciliations, invoicing, payment processing, inventory, asset management, contracts, and budgeting.

Expertise

Elevate is a national leader in equitable building decarbonization due to its comprehensive, building science- and community-focused approach to advancing clean energy solutions for underserved populations. The outcome of Elevate's work includes retrofitting over 221,000 units of affordable housing over the past 25 years, removing over 251,000 metric tons of carbon from the environment, creating 1,500 jobs, and injecting over \$114 million into communities that have been historically disinvested. Since 2020 Elevate has led the successful completion of nearly 500 residential electrification projects in partnership with a diverse set of community, utility, governmental, and funder partners. Elevate's Building Electrification Program provides financial support and a turnkey service model to help homeowners and property owners transition from fossil fuels to clean energy technologies, improving health, safety, and affordability. With large Project Delivery, Engineering, Program Support (Help Center), Marketing/Communications, Community Partnerships (Outreach), and Construction Management teams deeply experienced in implementing building decarbonization assessments, analyses, retrofits, and scaled programs, as well as supporting program participants through every step of their customer journey, Elevate is able to design and implement the broadest range of programs aimed at service frontline communities. Examples of relevant projects and initiatives are included in the Experience and Qualifications section.

Project Approach

Workplan Overview

Elevate recognizes that the program design phase in Contract 1 will require a short timeline, with multiple tasks occurring concurrently. We understand that a coordinated approach, with frequent communication and updates, will be necessary in order to meet the project timeline for program design.

Elevate has assembled an impressive team of project managers, policy analysts, engineers/technical experts, and outreach/engagement professionals that is fully and uniquely qualified to support the Village with this project. This team has deep expertise in energy efficiency, weatherization, health and safety upgrades, and decarbonization strategies, as well as outreach, engagement, and customer service with frontline communities.

We recognize that the overall objectives of this project are to accelerate building decarbonization and reduce greenhouse gases from the residential building sector. Our understanding is that all decarbonization projects for vulnerable community members should also prioritize energy bill utility savings with the underlying goal of preserving long term housing affordability for rent and homeowner cost burdened population.

Our ongoing approach to project management is to have a single point of contact for all information and questions which the Village will work with on all aspects of the project. Elevate will then bring in multiple team members as experts to shape the program design as related to specific topics, including:

- Stakeholder Engagement
- Engineering / Technical Aspects of Decarbonization
- Construction Management and Contractor Support
- Help Desk Operations
- Additional Experts: Incentives, Income Eligibility and Verification

Each of these experts will provide recommendations for the design of their topic but will also share information so that all aspects of program design are woven together and complement each other accordingly. Many of these program design approaches can be developed concurrently. We will also begin planning one stakeholder engagement session at the beginning of Contract 1, in order to solicit feedback approximately 4-5 weeks into the Contract 1 phase. This timing will allow us to share initial draft program design ideas and solicit meaningful feedback from stakeholders before the program design is finalized. In Elevate's experience leading feedback sessions on program design, we have found it most productive to provide stakeholders with a draft framework to react to rather than facilitate ideas from scratch.

Our team believes in regular communication as one method to meet expectations, but also as a way to ensure Village staff are integrated into the services provided by Elevate. We recommend a weekly meeting with the Village to share project progress and updates, ask questions, and receive any new feedback or information from Village staff. We intend to also hold weekly update meetings on program design with our internal team of experts, so all are informed of the design decisions being made and can coordinate accordingly.

Quality Assurance Plan

We understand the importance of quality assurance and quality control. During the program design phase in Contract 1, all deliverables will be reviewed by appropriate leadership to ensure high quality and consistency in approach across various topics. During the program implementation phase, we plan to include several processes to ensure quality. For example, we will implement a comprehensive training program with process check-ins for all staff involved in building assessments. Additionally, we will introduce a secondary desk review process for a representative sample of building assessment reports to ensure the highest standards of quality, accuracy, and consistency across all evaluations. For help desk operations, we will implement checklists to ensure program staff consistently greet customers, provide clear explanations, and offer actionable solutions. Program management will occasionally review a random sample of calls and email tickets to assess clarity and accuracy of information and help calibrate responses to ensure consistency.

Project Management Approach

The Elevate team prioritizes project management by implementing well-defined processes and procedures that form the foundation of Elevate's project management approach. Elevate's project management approach is based on the standards and guidelines developed by the Project Management Institute (PMI) and is overseen by its Project Management Office, the governing body for project management at the organization. Elevate's project managers, many with years of project management experience, are trained on Elevate's project management processes and procedures. Elevate's project and program managers are committed to ensuring projects and programs are managed efficiently and in compliance with contract requirements while delivering the benefits of the programs to the people and communities they serve. Elevate's project management approach employs organizational principles that will be used as keystones to achieve a fully integrated effort that meets our quality standards, adheres to cost estimates and schedules, and meets or exceeds client expectations. These principles include:

- Establishing clear lines of communication, responsibility, and authority
- Using uniform means of collecting and disseminating information
- Establishing and maintaining realistic baselines, cost estimates, and schedules against which performance can be measured
- Promoting the use of standardized and disciplined work practices for all project participants and verifying compliance with these practices
- Assigning personnel with proven leadership skills and experience whose first priority is the project
- Satisfying the technical, cost, and schedule requirements of the project

Elevate will seek to clearly define ways Village staff can be integrated into the services offered in this initiative. Initial recommendations are provided in the sections below, but these should be refined in consultation with Village staff. In place-based programs across the country, Elevate partners with municipalities as consultants, program designers, and implementation partners. We understand the complexities of working with municipalities and that no two are exactly the same. However, our experience in being a patient and solutions-oriented partner with municipalities can be shown through our continued partnership over many years with Cities, Counties, State Agencies, and Regional Planning Organizations. Not only are we practitioners of resilience and efficiency programming, we are also students and teachers. Elevate is a leader and core partner in multiple initiatives that serve municipalities in developing their own programs, including BuildingsUP, the Bloomberg American Sustainable Cities Initiative, the Community Retrofit Collaborative, and Community Climate Shift. All these initiatives focus on helping Cities and Community-Based Organizations to develop different types of housing efficiency and resilience programs, and we have built a deep knowledge base and expertise in how cities across the country are doing this work.

Contract One: Program Design

Elevate's high level approach to program design for the Village of Oak Park's Energy Efficiency and Electrification One-Stop Shop is to draw from best practices and lessons learned from similar programs in Illinois and beyond that are administered by Elevate, including the Green Homes Chicago program, the Evanston Green Homes Pilot, the Madison (Wisconsin) Efficiency Navigator program, the City of Ann Arbor (Michigan) Bryant Neighborhood Decarbonization project, the Cook County Healthy Homes for Healthy Families program, and Elevate's grant-funded electrification offerings completed from 2020-present. Elevate will also collect best practices from other programs for which Elevate is not the program implementer.

Understanding that the program design should be completed rather quickly in 60 days, Elevate will be able to quickly pull together suggestions and best practices and begin preparing a draft of the program design for the Village. We plan to hold at least one in-person stakeholder input session to learn about the needs and barriers of the community, including homeowners, multifamily building owners, and renters. This input will be used to inform the program design and ensure the program is developed to meet the needs of the most vulnerable residents. Elevate will then share draft program design documents with the Village of Oak Park for review, then revise and finalize the program design based on feedback and input from the Village. For the purpose of program design, the Village may wish to establish a Municipal Advisory Committee of some kind consisting of representatives from relevant departments.

Specific tasks to be completed under the Program Design contract are detailed below.

Task One: Kick Off Meeting

We will begin with a kickoff meeting upon being awarded Contract 1. At the kickoff, we will review the goals of the project and any additional expectations of the Village; confirm the scope of work, timelines, deliverables, and key milestones; and discuss the initial tasks in the scope of work. The Elevate team will provide a full list of team members, with their roles on the project and contact information for the Village.

Deliverables:

- Facilitated kick off meeting with agenda and summary of discussion
- Full list of team members with roles and contact information

Task Two: Background Research to Summarize Best Practices and Lessons Learned From Other One-Shop Stop or Electrification Programs

Elevate staff will collect best practices and lessons learned from the program designs of similar programs as note earlier. We will also conduct rapid outreach to administrators of related one stop shop initiatives to understand program design details and best practices. Examples of

potential targets include the Built to Last initiative in Philadelphia, LEAN (Low-Income Energy Affordability Network) in Massachusetts, Efficiency Navigator in Madison (Elevate administers with local organization Sustain Dane), and the BayREN (Bay Area Regional Energy Network) Home+ program in San Francisco. Elevate will also draw best practices from our current [Building Energy Hub](#) project, which serves as a one-stop shop for owners of larger residential or commercial buildings to access resources and technical assistance for energy efficiency and decarbonization.

Some of the topics that will be considered and summarized include: Income eligibility requirements; income verification processes; initial screening questions; energy assessment protocols (such as what to include in the energy assessment and types of tests to be performed); priority information to capture in assessment reports, prioritization of retrofits/upgrades; contractor selection and management; quality assurance/quality control (such as post retrofit inspections), and the coordination of services with adjacent Village initiatives and external co-funding or braiding opportunities.

Our team will also consider how to structure marketing, communications, and outreach so that at least 40% of the funds available for this program reach the most vulnerable residents. In our experience, developing long-term partnerships with trusted community organizations is one of the best methods to consistently reach income-eligible communities. We also have experience developing communications and marketing materials that are simple and easy to understand while conveying clear information about energy programs and call-to-action for potential participants to take the next step and enroll in the program.

Elevate plans to gather information such as eligibility requirements and current incentives or rebates provided for the multiple existing or forthcoming offerings that could be used to stack or braid funds with the Oak Park One-Stop Shop. Elevate has deep knowledge of these programs and serves as implementer of some of the offerings, allowing our team to quickly gather information and incorporate program requirements and eligibility into the design of the One Stop Shop. Some of the programs to be included in this review are:

- ComEd [Single Family Home Energy Savings](#)
- ComEd [Multi-Family Energy Savings Program](#) (MFES)
 - Elevate is part of the team implementing this offering
- ComEd [Whole Home Electric](#) Program
 - Elevate supported the launch of this offering
- ComEd [Go Electric](#) Program
- [Illinois Housing Weatherization Assistance Program \(IHWAP\)](#)
- Future Offering: State of Illinois Home Energy Rebates and Home Electric Appliance Rebates (funded by the U.S. Department of Energy)
- [Illinois Solar for All \(ILSFA\)](#)
 - Elevate is currently the program administer

- The Village's [Climate Ready Energy Grants](#)
- The Village's Homeowner Programs, including the [Single-Family Rehabilitation Loans & Grants](#)

After gathering this information, Elevate will begin crafting a strategy to connect income eligible households with appropriate programs. Our team is currently developing similar strategies in other municipalities. For example, we are working to refer Green Home Chicago participants to ILSFA, and we have also developed an innovative cost sharing agreement with ComEd that allows us to directly braid Whole Home Electric incentives with the Green Home Chicago and Evanston Green Homes programs.

Deliverables:

- Summary of best practices and lessons learned in the program design of similar programs
- Summary of research into other offerings, including eligibility requirements

Task Three: Conduct Stakeholder Research and Engagement

Elevate will rapidly work to set up one stakeholder engagement session with a goal of soliciting feedback on the program design. To share information about this session, Elevate will work with the Village to send event details out through existing networks, such as the [Oak Park Climate Action Network](#) and their Oak Park Climate Coaches, and the One Earth Local [Climate Ready Community Outreach to Oak Park](#) members. Elevate will also reach out to other trusted community groups and organizations, such as houses of worship, to develop relationships and share information regarding stakeholder events.

Elevate has a team of seasoned facilitators who will plan and execute the event, including developing the agenda and topics for discussion; working with the project manager and the Village to determine what feedback is most needed and useful; facilitating discussions and soliciting feedback; and summarizing input received and meeting outcomes.

Deliverables:

- Stakeholder Engagement session meeting agenda and presentations
- Stakeholder Engagement session meeting notes and summary of outcomes

Task Four: Develop and Finalize Program Design

As a final activity to consolidate all previous research, stakeholder input, and planning efforts, the Team will prepare a comprehensive draft Program Design Document for each program component that provides additional context and recommendations for implementation. Our understanding is that the one-stop shop program will include components such as: conducting energy assessments, designing Home Energy Roadmaps, providing assistance on incentive and

financing options, and offering a help desk to answer questions from building owners and residents.

Our team has experience in both program design and program implementation of all these aspects of the one-stop shop, allowing us to draw from recent experience to design an approach that allows the Village to work with a wide range of stakeholders to meet program and Village goals. We understand the program design should include a number of factors, such as:

- Providing building energy assessments
- Developing Home Energy Road Maps
- Providing assistance through one-on-one customer support as well as a Help Desk
- Educational workshops and materials
- Contractor training resources
- Bulk purchasing programs
- Metrics tracking and reporting
- Ongoing continuous improvement, especially changes to program design in case metrics are not being met
- Coordinating with Village staff, utilities, state program representatives, and others to incorporate community and regional sustainability programs.

Another item to consider in the program design is ongoing stakeholder engagement, not only to share information about the program and recruit participants, but also to solicit feedback on how the program is working and any changes or updates to make to the program design. This may also be an opportunity to identify early participants or candidates to help with trial runs or calibrations of building assessments.

We will create a draft Program Operations Manual to include timelines, a summary of the participant eligibility and verification process, mock-ups of initial materials, a metrics tracking plan, and a data privacy and security plan. Our team has created similar document for other programs, including a highly detailed Program Operations Manual for the ComEd/Peoples Gas/North Shore Gas/Nicor Gas Multi-Family Energy Savings Program, which provides over \$30 million in incentives per year for multi-family energy efficiency projects. Based on our knowledge of setting up and launching program operations, we will create realistic timelines for program implementation.

We recommend that the Village of Oak Park consider a 'soft launch' to occur in late 2025 (or early 2026 depending on Contract One timeline) to begin the process of conducting energy assessments and working with building owners or homeowners on developing their Energy Road Maps.

Elevate will share the draft Program Operations Manual and provide an overview in a meeting with the Village staff within 60 days of the start of Contract 1. If desired, Elevate will also share the draft Plan with key external stakeholders for their review and feedback.

After receiving feedback from Village staff and other key stakeholders, Elevate will update and complete the program design, develop a final version of the Program Operations Manual, and prepare for a soft launch of the program.

Deliverables:

- Draft and Final versions of Program Design Document
- Draft and Final versions of the Program Operations Manual

Contract Two: Program Management, Outreach, and Implementation

While the exact scope of services in Contract Two will be dependent on the final Program Design and Program Operations Manual, Elevate is prepared to launch and implement the Energy Efficiency and Electrification One-Stop Shop in late 2025. Our team assumes that some ramp-up time is needed to conduct meaningful outreach, develop or leverage community partnerships and relationships to inform residents and potential participants about the program, recruit and manage contractors to participate in providing building upgrades, and begin receiving inquiries about the program to the Help Desk. However, some program activities can begin soon after the Program Design and Program Operations Manual is finalized.

Specific tasks to be completed under the Program Implementation contract are detailed below.

Task One: Kick Off Meeting

Similar to Contract One, we will begin with a kickoff meeting upon being awarded Contract 2. At the kickoff, we will review the Village's goals and expectations; confirm the scope of work, timelines, deliverables, and key milestones; and discuss the initial tasks in the scope of work. The Elevate team will provide an updated list of team members, with any changes noted regarding the roster, their roles on the project, or contact information.

Deliverables:

- Facilitated kick off meeting with agenda and summary of discussion
- Updated list of team members with roles and contact information

Task Two: Program Soft Launch

We propose a "soft launch" to begin program operations. Conducting a soft launch before a full-scale rollout offers several strategic advantages, including:

- The ability to introduce the program to a limited, controlled audience with whom you can identify and resolve issues before the program reaches the broader public.
- The ability to collect valuable feedback from real customers on their experience and the quality of offerings and communication materials.
- The opportunity to demonstrate internal processes and coordination with Village staff and/or key stakeholders.
- Generate early success stories or testimonials that can be leveraged in promotional materials for the broader rollout.

Soft launch goals will include conducting between five to ten building energy assessments, completing corresponding Energy Roadmaps, providing deliverables to Village staff and key stakeholders for review, and surveying the initial participants to collect their feedback and suggestions for improvement. To recruit these initial participants, Elevate recommends leveraging interested stakeholders from Contract 1 stakeholder outreach events and meetings, and working through known candidates from existing local efforts like the Oak Park Climate Action Network's Climate Coaches initiative. While these outward facing activities are soft launched, the project team will be standing up key help desk materials and processes around providing expert assistance on available incentive/financing options and preparing information related to advice on electrification projects, bid and contractor evaluation, building permits, and other relevant and related topics.

Upon completion of the soft launch, Elevate will finalize materials and processes needed for the full launch of the program, including collateral for outreach and education, Help Desk Operations, and reporting. Elevate envisions the Soft Launch period taking place from October to December 2025, allowing the Full Launch to occur at the start of January 2026.

Deliverables:

- Up to ten completed building energy assessments and custom roadmaps
- Initial collateral for outreach and education

Task Three: Evaluation, Reporting, and Continuous Improvement

Successful implementation of the Energy Efficiency and Electrification One Stop Shop program will require a robust and transparent plan for evaluation, with a particular focus on outcomes within vulnerable populations. During the Contract One: Program Design phase, Elevate will work closely with Village staff and other key stakeholders to identify the most important metrics and outcomes to track.

After the soft launch is nearly complete during Contract Two, Elevate will work to evaluate the energy assessment and Road Map structure and process. Elevate will solicit and synthesize feedback from program participants who received the initial five energy assessments and Road

Maps and will analyze results of the Road Maps. Based on these inputs the Elevate team may suggest updates or improvements to the energy assessment and Road Map process.

Elevate will also develop an initial evaluation framework during this task. The evaluation framework will be centered on clearly defined Key Performance Indicators (KPIs) and success metrics that are directly aligned with the Village of Oak Park's stated objectives for the program. KPIs will likely include:

- *Accelerating Building Electrification:* Number of homes and buildings that undergo electrification upgrades, specifying the types of measures installed, such as heat pumps or induction stoves.
- *Reducing Greenhouse Gas (GHG) Emissions:* Avoided GHG emissions, quantifiable in absolute terms or relative to the investment made (e.g., per dollar invested).
- *Equitable Benefit Distribution:* The RFQ explicitly requires allocating at least 40% of program benefits to the most vulnerable populations. The primary metric will directly track this percentage. "Vulnerable populations" will be defined in alignment with Village criteria.
- *Maintaining Housing Affordability:* Average reduction in household energy burden for participating homes, especially for low-income households.
- *Tracking Engagement and Participation:* Engagement and overall participation metrics such as number of households engaged, help desk inquiries, and conversion rates from initial interest to action taken.

Deliverables:

- Final implementation plan with incorporated feedback from soft launch participants and Village staff
- List of potential KPIs to measure and report on program progress

Potential Contract Three: Full Program Launch and Implementation for 2026

Following the soft launch and any needed process or program improvements, pending Village authorization and funding for continued implementation, Elevate will complete the full program launch. Activities will include the following:

Help Desk

A help desk function will be available year-round to assist eligible residents and building owners in enrolling in building energy assessment and roadmap activities, to conduct proactive follow ups with participants, and to answer any questions from the public related to energy and electrification projects, available incentives, program referrals, bid and contractor evaluation, building permits, and other relevant topics.

Elevate will ensure help desk staff are trained not only in effective communication, but also relevant subject matter expertise based on each unique inquiry. To ensure consistency, a single point of contact will receive inquiries and assign them out to relevant program, engineering, or construction management staff based on the topic area. The help desk manager will be responsible for timely and high-quality responses and will use a ticketing system to categorize and track all received inquiries and their resolutions.

To meet diverse customer preferences and increase accessibility, the help desk will offer assistance through multiple channels, including email, phone, and in-person events. Key metrics that will be tracked include the number of help desk engagements, common inquiry topics, response time, and resolution time. All email and phone interactions will be available in either English or Spanish.

Outreach and Community Education

Elevate will leverage its deep bench of Community Partnerships and Program Marketing staff to design and implement a community outreach and education strategy. This will begin in the program design phase, where key staff experts will identify community-based groups, faith organizations, schools, small businesses, and other local “trusted messengers” who may be willing to lend their credibility and reach to help with outreach and building word-of-mouth momentum. This team will use available data and resources such as the Existing Conditions & Vulnerability Assessment to identify and develop strategies to engage the most vulnerable community members, including those with the highest rent and homeowner cost burden. Other sources of data may include historical program participation from the state-funded Weatherization Assistance Program or utility-funded income qualified programs; many of these homeowners and property owners may be primed and interested in pursuing additional upgrades.

The outreach and community engagement strategy may combine traditional methods like print promotions (mailings, flyers, local newspapers) with digital outreach (social media, municipal websites, email newsletters), and in-person events and resident gathering spaces such as festivals, farmers’ markets, libraries, etc. Where possible, outreach will feature local leaders or real participants to boost program credibility and participation.

To appeal to a diverse audience, educational resources will emphasize the health, comfort, and cost-saving benefits of energy efficiency and electrification upgrades, not just environmental impacts such as greenhouse gas emissions reduction. These materials will highlight available incentives, rebates, and technical assistance, be tailored to the unique building stock and specific types of homes in Oak Park and feature practical resources on topics like heat pump basics, how to weatherize your home, and questions to ask an HVAC contractor. Where possible, to reduce costs Elevate will leverage materials that are suitable but already exist (for example from local utility offerings).

Building Energy Assessments and Roadmaps

Offering high-quality building energy assessments and personalized Roadmaps is a core element of the Energy Efficiency and Electrification One Stop Shop program. Elevate has dozens of highly experienced staff engaged in this type of service supporting many different types of programs and clients across the Midwest. Each program typically has different goals and funding, so collectively these assessment and roadmap activities vary significantly in their depth and focus. Below we propose an approach to assessments and roadmaps that we believe will serve the best balance of cost, efficiency, and depth for this program. Elevate is successfully implementing this model in several jurisdictions and program contexts. However, we expect to discover and refine the most appropriate scope for this task during Contract One: Program Design phase.

Elevate staff will begin the assessment and roadmap process by collecting historical energy usage data and conducting a preliminary utility savings analysis. This may require a brief intake call or email with the participant, during which the on-site assessment can also be scheduled. An upfront understanding of how a household uses energy, which upgrades might provide the most cost savings, and whether electrification might be an appropriate strategy to consider (in terms of creating operational cost savings and reducing overall energy burden) provides a foundation for upcoming assessment and scoping activities.

Next, staff with relevant certifications conduct an on-site assessment of the home or building. For multifamily properties, this typically involves inspection of both common areas and any housing units that are available to view at the time of the assessment. Elevate proposes to support this process and the custom reporting that follows with a modern software solution such as SnuggPro¹. This tool offers several key benefits, primarily by streamlining the assessment process, assisting in generating clear and consistent reports with prioritized recommendations, and estimating energy savings, return on investment, and upfront cost.

Ultimately, the final scope of the assessment can be tailored to the Village's expectations, but can include general characterization of the building and current conditions, description of any health and/or safety hazards, measurement of insulation and condition of the thermal envelope, measurement or estimation of building airtightness, evaluation of existing appliances, and discussion with the occupant(s) on their use of the home and any energy or comfort-related issues.

Using the data collected during the assessment, Elevate engineering staff will run and QC energy savings calculations using the SnuggPro software to refine the initial utility analysis with the existing conditions of the home. The results of this updated analysis are then used to produce a personalized Home Energy Roadmap that contains a summary of the energy usage analysis, conditions identified during the assessment, top upgrade opportunities identified, and

¹ <https://snuggpro.com/>

	Soft Launch									
	Evaluation & Reporting									
3	Full Launch & 2026+ Implementation									

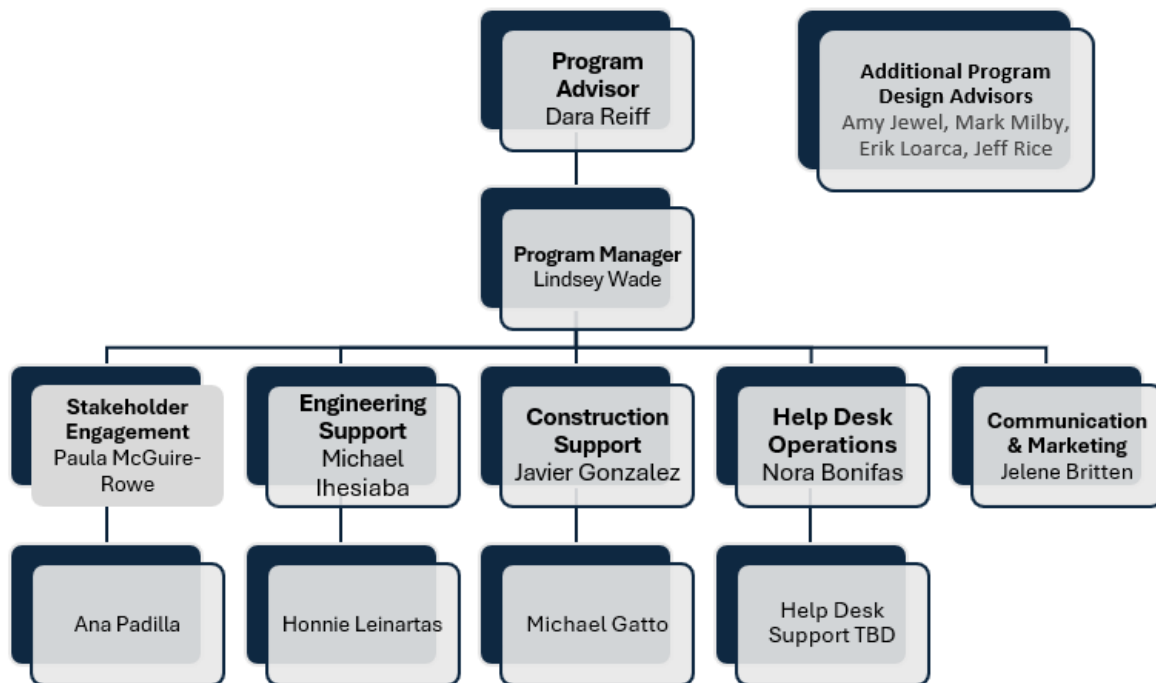
Project Personnel

Elevate provides highly qualified local staff that have successfully executed numerous projects of a similar size and scope to the Village of Oak Park's One Stop Shop. Our organization's vision is to work with frontline communities, and we have deep expertise in ensuring that the most vulnerable groups within the community can take part and benefit in clean energy programs. Headquartered in Chicago, IL, nearly all of the Elevate team proposed to work on this project are located in northern Illinois and within proximity to the Village of Oak Park.

Our vision is to assign a single point of contact for all project work, who will serve as a project manager, supported by specific team members who would lead key aspects of the scope of work. We also plan to bring in subject matter experts from our broad bench of expertise as needed for various topics. Our team has deep knowledge and expertise in topics such as the technical aspects of energy efficiency and decarbonization; program design; community outreach and engagement; marketing, messaging, and communications; customer service, such as providing a help desk and supporting participants' customer journey; tracking and reporting; and continuous improvement.

Organizational Chart

The organizational chart for this project is provided below.



Key Personnel

Brief bios of key staff are listed below. Resumes are included in the Appendix.

Dara Reiff, PMP, Elevate

Dara Reiff is Director of Nonprofit & Public Sector Programs at Elevate, where she leads initiatives helping nonprofits and public agencies reduce energy use and meet decarbonization goals. With over a decade at Elevate, she has led energy planning, stakeholder engagement, and the delivery of upgrades to hundreds of nonprofits. Dara is a certified Project Management Professional and holds a BA in Urban and Regional Planning from the University of Illinois at Urbana-Champaign.

Lindsey Wade, Elevate

Lindsey Wade is the Senior Associate, Public Sector at Elevate. In this role, Lindsey leads cross-functional teams to implement residential retrofit and electrification programs such as Evanston Green Homes, optimizes funding strategies, monitors funding compliance, develops financial and performance reports, cultivates strategic partnerships, and designs community engagement strategies to expand program impact and support climate-resilient affordable housing. Lindsey holds a BA in Sociology and a Master of Public Administration from the University of Illinois at Chicago.

Mark Milby, Elevate

Mark Milby is Senior Director of Programs at Elevate. In this role, he is responsible for leading equitable building decarbonization strategies, including policy development, fundraising, braiding and leveraging multiple funding streams, leading technical stakeholder engagement on innovative technologies, and advising on best practices. Mark holds a BS in Ecology from the University of Georgia and a Master of Public Affairs from Indiana University.

Erik Loarca, Elevate

Erik Loarca is a Project Coordinator at Elevate, where he manages various portfolios and implements electrification programs such as Green Homes Chicago. He is the direct point of contact for contractors and property owners and guides the building owner through the process once they receive energy assessment report until the end of the project. Erik holds a BA in Social and Environmental Sustainability from the University of Illinois at Urbana-Champaign.

Michael Ihesiaba, CEM, Elevate

Michael Ihesiaba is the Senior Director, Engineering at Elevate, where he leads Elevate's Engineering team in supporting the organization's engineering and technical expertise needs. The Engineering team conducts energy assessments, conducts energy modeling, and provides technical consulting for Elevate's programs, projects, and utility programs that deliver services to a wide range of buildings, including commercial nonprofit, multifamily, and public buildings. Michael holds a BS in Mechanical Engineering from the City College of New York and an MBA from Arkansas State University.

Javier Gonzalez, Elevate

Javier Gonzalez is the Senior Director of Technical and Construction Services at Elevate. In this role, he supports and oversees a team of technical staff, project delivery leads, and construction experts that serve our Environmental Health, Water, Decarbonization and Efficiency programs. Javier is a graduate of the Building Energy Technologies Program at Wright College.

Michael Gatto, Elevate

Michael Gatto is the Construction Manager for Building Electrification at Elevate. In this role, Michael works closely with external construction contractors, Elevate Program Management, Engineering, and Project Lead team members in the delivery of electrification projects. Michael holds a BS in Chemical Engineering from the Massachusetts Institute of Technology and a Master of Architecture from the University of Texas at Austin.

Honnie Leinartas, Elevate

Honnie Leinartas is the Manager of Engineering at Elevate. In this role, she leads a team of one-two engineers and provides engineering support to a variety of programs that help residential buildings, homeowners, and other nonprofits in communities identify opportunities to reduce

their energy usage and costs. She is also the lead engineer for all Elevate-led single-family decarbonization and building electrification efforts in the Chicagoland area. She holds a BA in Architectural Studies from the University of Illinois Chicago and an MS in Civil Engineering from the Illinois Institute of Technology.

Amy Jewel, Elevate

Amy Jewel is the Vice President of Programs at Elevate. In this role, she oversees Elevate's role in implementing several large-scale clean energy programs. She also manages the Program Support Team, which currently provides phone, email, chat, and other support to participants across twelve unique programs implemented by Elevate. Amy holds a BA in Psychology from Columbia University and a Master of Environmental Science and Management.

Jelene Britten, Elevate

Jelene Britten is the Senior Director, Marketing, at Elevate. In this role, Jelene directs marketing strategies to encourage people to enroll in innovative clean energy and water programs. She oversees all marketing and communications for several large-scale programs for Elevate. Jelene holds a BS in Journalism from Northwestern University.

Jeff Rice, Elevate

Jeff Rice is a Construction Manager at Elevate. In this role, Jeff facilitates the implementation of Elevate's various construction projects throughout Wisconsin. He works directly with contractors, suppliers, and clients to ensure that projects are accomplished on time and on budget. Jeff holds a BA in Communications from the University of Wisconsin – Stevens Point and an MBA from Concordia University.

Paula McGuire-Rowe

Paula McGuire-Rowe is the Associate Director of Community Partnerships at Elevate. In her role Paula coordinates initiatives that unite families, building owners, and community partners to advance energy education. Additionally, overseeing initiatives focused on energy efficiency, renewables, and smart technology, she ensures alignment with the organization's goals. She holds a BSM in Management from National Louis University and an MBA from the University of Phoenix.

Nora Bonifas, Elevate

Nora is an Associate in Program Support at Elevate. As a member of the Program Support Team, she keeps in contact with folks who participate in various energy efficiency programs across Illinois. She specializes in the Multifamily Energy Savings program, having built out and maintained processing for the program in addition to balancing an increased clientele and taking on training for future Program Support Associates who might join the program. She holds a BS in Physics and Computer Science from Loyola University Chicago.

Ana Padilla, Elevate

Ana Padilla is an Associate at Elevate.

Experience and Qualifications

Recent Project Examples

The project team has proven experience and success providing the services that are key to achieving the Village of Oak Park's objectives. Below are some examples of how Elevate demonstrates experience and knowledge in these areas.

Experience #1 Chicago Green Homes Program	
Date of completion	Ongoing (scheduled completion 12/31/2026)
Similarity to Scope of the RFQ	The Chicago Green Homes program offers comprehensive residential energy efficiency and electrification upgrades for low-income households.
Description of Project	Elevate is one of the administrators for the Green Homes Chicago program, launched by the City of Chicago's Department of Housing to provide up to \$50,000 in free home energy upgrades and energy efficiency retrofits for income-eligible homeowners.
Scope of Services Provided	Program management, reporting, assessments, billing analysis and engineering review, contractor procurement, construction management, inspections and construction close out, participant education and engagement.
Cost of Services	\$5M
Project Manager or Key Team Members	Eric Loarca, Program Manager Mark Milby, Director
Contact information for References	Steph O'Connor, Project Manager City of Chicago Department of Housing (DOH) Bureau of Homeownership Programs (312) 742-0437

Experience #2 Evanston Green Homes

Date of completion	Ongoing (scheduled completion 12/31/2025)
Similarity to Scope of the RFQ	Elevate designed and implemented Evanston Green Homes as a one-stop shop for single- and multifamily energy retrofits, using a human-centered approach to community engagement and service delivery and leveraging utility programs and incentives along with statewide residential energy efficiency initiatives to deliver phased, assessment-based installations aligned with the City of Evanston's 2050 carbon-neutrality goals and scalable for future program iterations.
Description of Project	Evanston Green Homes serves two environmental justice communities in Evanston, Illinois, targeting single-family homes and small- to medium-sized multifamily buildings to retrofit a total of 30 housing units. The pilot focuses on health, safety, and energy efficiency, and provides opportunities for full building electrification and aims to preserve the city's affordable housing stock, effectuating affordability preservation requirements on multifamily properties.
Scope of Services Provided	Elevate serves Evanston Green Homes through end-to-end services, including community outreach, income and eligibility verification, energy assessments, comprehensive utility analysis, phased decarbonization and project planning, funding and financing packaging through leveraging of utility rebates and incentives and state-funded initiatives, contractor recruitment, construction oversight, quality assurance, customer satisfaction monitoring, and bill impact analysis over a period of 12 months—serving as a single point of contact for participants, contractors, and key community stakeholders. Elevate also reports energy savings, utility cost savings, and community impact narratives on a quarterly basis to the City of Evanston and other key community stakeholders, in addition to utility partners.
Cost of Services	\$1.2M
Project Manager or Key Team Members	Lindsey Wade, Project Manager Dara Reiff, Director

Contact information for References	<p>Cara Pratt</p> <p>Sustainability and Resilience Manager</p> <p>City of Evanston</p> <p>847-448-8199</p> <p>cpratt@cityofevanston.org</p>
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Experience #3 City of Ann Arbor, Bryant Neighborhood Decarbonization (Michigan)	
Date of completion	Ongoing (scheduled completion 12/31/2025)
Similarity to Scope of the RFQ	Elevate has been working with the City of Ann Arbor, a local CBO, Community Action Network, to raise funding and provide a one-stop-shop delivery of home upgrades to the 272 homes in the neighborhood.
Description of Project	The Bryant Neighborhood is Ann Arbor aims to be the nation's first fully decarbonized low-income community in America. It is an environmental justice community, with all residents living at or below 80% AMI, 50% unsubsidized rental housing, and the majority of black residents.
Scope of Services Provided	To date, our team and the city have raised nearly \$20M in funding, upgraded 40 homes, and will upgrade another 85 over the coming year. This includes everything from home repair, drainage and water damage remediation, energy efficiency, electrification, and solar. The city is also building a district geothermal system to serve the entire neighborhood with cost-effective, all-electric heating and cooling.
Cost of Services	\$1.2M
Project Manager or Key Team Members	Henry Love, VP of Strategy
Contact information for References	<p>Missy Stults, PhD, Sustainability and Innovations Director</p> <p>City of Ann Arbor</p> <p>734-794-6430</p> <p>mstults@a2gov.org</p>

Additional relevant examples of Elevate's experience are provided below.

Madison Efficiency Navigator (Wisconsin)

In partnership with Sustain Dane, a local not for profit organization, Elevate implements the Efficiency Navigator program in Madison, Wisconsin. The Efficiency Navigator program helps the owners of small to medium-size multi-family housing make their buildings more efficient and resilient while reducing their operating costs, so the housing remains affordable. The program goals are:

- Resilience – Foster innovation to help preserve affordable workforce housing
- Equity – Address the intersection of environmental, social, and economic justice for cost burdened residents
- Climate Change – Reduce energy and water demand in our existing building stock to tackle the effects of climate change

The Efficiency Navigator program provides a one-stop shop to guide and assist property owners through the entire process of implementing energy efficiency measures for their properties. Eligible buildings receive a complimentary building assessment, followed by a report that includes an energy analysis and recommended upgrades. If the building owner chooses to move forward, they receive step-by-step technical support to hire and manage contractors and complete the upgrades.

Recently the program expanded to neighboring communities in Wisconsin, including Middleton, Fitchburg and Eau Claire. It has completed over 200 projects, has almost 100 currently in process, and will serve over 830 units under its current funding.

Detroit Solar Neighborhoods (Michigan)

The City of Detroit put out a challenge to communities in 2022 – identify areas of the city where whole blocks could be redeveloped for large solar projects and have the residents on those blocks agree to take a buyout and surrounding neighbors to not try to block the development. In return, neighbors would receive community benefits from the developers in the form of home upgrades. Elevate was selected by one of the developers to assist in distributing those community benefits across 3 communities. We partnered with the city and the local utility to maximize the community benefits by pairing it with utility incentives, with some homes receiving upwards of \$40,000 in home repair, efficiency, and solar installation work. Overall, Elevate will oversee the assessment and construction of 150 homes and will provide \$5M in home upgrades. The City of Detroit is purchasing all the electricity generated by solar developments.

Cook County Healthy Homes for Healthy Families (Illinois)

Elevate administers the Cook County Healthy Homes for Healthy Families (HHHF) program on behalf of the Cook County Departments of Environment and Sustainability and Public Health. Utilizing nearly \$30 million in ARPA funding, the program will deliver 600 single family or small multi-family home upgrades over three years in suburban Cook County. HHHF has a tiered

approach that prioritizes first addressing health and safety concerns, followed by water efficiency measures and energy efficiency measures that are practical prerequisites to beneficial electrification, including air sealing and insulation. A small portion of the homes already weatherized will receive decarbonization support under the program, including electrification of the heating, cooling, and domestic hot water systems. As the administrator of HHHF, Elevate is responsible for participant engagement, assessment, scope of work, contractor recruitment and management, construction oversight, post-construction monitoring, reporting, and compliance.

City of Chicago Home Repair Program (Illinois)

As Delegate Agency to the Chicago Department of Housing, Elevate operated the Home Repair Program for zone one and the Emergency Heat Repair Program citywide. The Home Repair Program aimed to complete up to 175 jobs over three years, primarily replacing roofs and porches. The Emergency Heat Repair Program replaced 103 heating systems in the 2022-23 season. For both programs, Elevate was responsible for assessments, scope of work, contractor recruitment and management, construction oversight, reporting, and compliance. For home repair, Elevate was additionally responsible for participant qualification certification or re-certification for a proportion of applicants. While the need to rapidly replace failed or failing systems makes fuel switching impractical in the emergency heat program, Elevate worked diligently to ensure that most system replacements were upgraded to high efficiency models.

Building Electrification Program (Midwest)

Elevate currently administers a Building Electrification Program that has electrified nearly 500 units of housing across the Midwest in both multi-family and single-family housing. Elevate's success is based on the expertise of our team including our program management, technical and construction expertise, long-term relationships with community partners and equipment manufacturers, and deep experience in working closely with participants throughout the decarbonization process. Another factor of success is how we leverage various funding streams in a seamless way to the participant. All of Elevate's electrification work has focused on low-income households and either subsidized or unsubsidized affordable housing units. Our approach to implement equitable electrification considers how under-resourced communities are experiencing the bill impacts and performance of heat pump technologies, with the goal of addressing energy burden while putting these homeowners first in line to receive comprehensive services.

References

References and a list of entities for which services have been performed (Section IX of the RFQ) are included in the Required Forms section of the proposal.

Budget / Cost Proposal

We propose to perform this work on a fixed fee basis. The following table presents Elevate's proposed 2025 hourly rates by labor category. We anticipate that estimated hourly rates will escalate annually based on market conditions. Additionally, travel costs and other reimbursable expenses such as meeting supplies will be estimated and submitted upon review of a specific scope of work.

Table 1. 2025 Hourly Rates by Labor Category

Labor Category	2025 Hourly Rate
Executive/Senior Advisor/VP	\$300
Principal Director	\$215
Associate Director	\$190
Director	\$190
Manager	\$175
Associate	\$135

To successfully deliver on the goals of the Energy Efficiency and Electrification One Stop Shop Program Design and Implementation effort, Elevate requests a budget of \$299,700 assuming an anticipated start date of July 15, 2025.

Table 2. Budget Estimate by Task – Contract One (Program Design)

Task	Budget	Budget Justification
Contract 1 – Program Design		
Task 0	\$44,500	Project management
Task 1	\$2,330	Kickoff meeting
Task 2	\$21,055	Background research and best practices
Task 3	\$22,325	Stakeholder engagement and program design input
Task 4	\$35,000	Develop and finalize program design
Expenses	\$355	Meeting/event materials

Total Contract 1	\$125,565
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Table 3. Budget Estimate by Task – Contract Two (Program Soft Launch)

Task	Budget	Budget Justification
Task 0	\$48,765	Project management
Task 1	\$1,815	Kickoff meeting
Task 2	\$103,650	Soft Launch
Task 3	\$19,550	Evaluation, reporting, and continuous improvement
Expenses	\$355	Meeting/event materials
Total Contract 2	\$174,135	
Total Contract 1 and 2	\$299,700	

Appendix A – Required Forms



The Village of Oak Park
Village Hall
123 Madison Street
Oak Park, Illinois 60302-4272

P: 708.383.6400
F: 708.383.9584
www.oak-park.us
village@oak-park.us

Addendum

Addendum Number:	1
Addendum Date:	5/19/2025
Project Name:	Energy Efficiency and Electrification One Stop Shop
Prepared By:	Lindsey Nieratka
To:	All bidders of record

This addendum amends the original RFP. Where any part of the RFP is amended, the unaltered provisions are to remain in effect.

Proposers must acknowledge receipt of any and all addenda as required by the General Requirements of the RFP and in Section 4 of this document. The acknowledgement page should be signed and included in the proposal document.

All requirements of the Contract Documents remain unchanged.

Part 1 – Amendments to the RFP

1. None

Part 2 – Attachments

1. None

Part 3 – Questions & Answers

1. Over the course of the contract period, is the Village's expectation that education and home assessments will primarily lay the groundwork for future upgrades, or that the program will also deliver deeper retrofit outcomes—such as electrification and energy efficiency upgrades—that directly support the Village's six core commitments around emissions reduction and utility cost savings?

ANSWER: The primary purpose of this contract will be to lay the groundwork for future upgrades. Future iterations of the program may include deeper retrofits.

2. What volume of home retrofits (electrification and/or energy efficiency) does the Village aim to achieve during the contract period?

ANSWER: The volume will depend on available funding.

3. If awarded Contract 1 (program design), would the firm be considered for Contract 2 (implementation), or will that be a separate competitive process?

ANSWER: If awarded Contract 1, the firm will be able to negotiate Contract 2.

4. Of the \$300,000 budget for program design and implementation, is there guidance on how those funds should be allocated?

ANSWER: \$300,000 is the total budget allocated through the end of 2025. The budget request for 2026 will depend on program design.

5. Does the \$300K budget include direct homeowner support—such as rebates, energy audits, or other affordability measures—or is that funding expected to come from a separate or supplemental budget to further reduce out-of-pocket costs for residents?

ANSWER: \$300,000 is the total budget available for FY2025. This will include program design and, if Contract 2 is negotiated to start in 2025, the operations of the program which at minimum will include education and energy audits.

6. How will the implementation budget (Contract 2) be defined—based on the design in Contract 1, a fixed portion of the \$300K, or another mechanism?

ANSWER: The implementation budget will be based on the design in Contract 1.

7. Can the Village help subsidize or cover the cost of home assessments?

ANSWER: Yes, it is intended that the assessments will be paid by the Village and be free of cost to the participants.

8. Is the budget of \$300,000 intended for program design, program implementation, and also the cost of the building upgrades and retrofits? Or is the \$300,000 only intended for program design and program administration?

ANSWER: The \$300,000 is the budget allocated for 2025. This is intended to cover the cost of program design and any operations in 2025 including program administration and the cost of the energy audits.

9. Does the Village have a goal for the number of residential units or homes to be retrofitted or would this be developed during program design?

ANSWER: This will be developed during program design.

10. We would also like to understand the Village's long term vision for this program. How would it interact with a possible Building Performance Standard, for example? Does the Village anticipate increasing the funding or identifying a funding source over the long term, such as the next 5 years?

ANSWER: The Village will continue to seek additional funding for the program. The program will be a support to future Building Performance Standards should those be established and should be an incentive for covered buildings to participate in the mandatory benchmarking program currently in place.

11. The Village currently offers energy efficiency grants for single family homeowners, but are there plans to extend this or create a similar funding program for multifamily properties? Are there other local matching grants or cost sharing opportunities available that could be combined with external program, rebate, or grant funding?

ANSWER: The Village will continue to seek funding and opportunities to support multifamily properties. One of the proposed services in the One Stop Shop will be identifying external programs that may benefit participating properties.

12. Will any of the funds be intended for health and safety upgrades that may be needed prior to electrification or energy efficiency?

ANSWER: The Village has some funding for health and safety upgrades in a separate program. The One Stop Shop can connect participants to these programs.

13. Would the implementation partner continue collaboration with Climate Coaches as referral sources or educators?

ANSWER: Yes, it is anticipated that the Climate Coaches will continue to provide peer-to-peer advice and mentoring in the community.

14. Would the Village support the use of multiple technologies, product types, or equipment providers (e.g., different OEMs) to expand affordability and homeowner choice, as long as all performance and quality standards are met?

ANSWER: The Village would be supportive of multiple technologies, product types, and equipment providers. However, current Village grant programs only cover electric equipment.

15. Are there any specific technology restrictions or requirements for participating contractors?

ANSWER: Contractors must be registered with the Village. Current Village grant programs only cover electric equipment.

16. Is it the expectation of the Village that both the scope of work for Contract 1:Program Design and Contract 2: Program Management, Outreach, and Implementation be accomplished for \$300,000?


ANSWER: \$300,000 is the budget currently allocated to the program for FY2025. The FY2026 budget request will be made in part based on the outcome of the program design.

17. The RFQ indicates that the Village of Oak Park would like 40% of program benefits to go to the most vulnerable population and requires the development of a Program Plan that includes participant eligibility and verification processes. Will the Village be providing parameters/definitions outlining how to identify the most vulnerable population or their expectations on eligibility for the program?

ANSWER: Yes, this can be further defined in the program design process. The Village's [Existing Conditions & Vulnerability Assessment](#) provides information on vulnerable populations in the Village.

Part 4 – Acknowledgement

I acknowledge the receipt of this addendum for the referenced project by signing the acknowledgement and returning it with the proposal. This acknowledgement must be signed and included with proposal.

Addendum Number:	
Date:	
Name:	
Signature:	
Company:	

End of Addendum

SECTION VI
ORGANIZATION OF FIRM

Please fill out the applicable section:

A. Corporation:

The Contractor is a corporation, legally named _____ and is organized and existing in good standing under the laws of the State of _____. The full names of its Officers are:

President _____

Secretary _____

Treasurer _____

Registered Agent Name and Address: _____

The corporation has a corporate seal. (In the event that this Proposal is executed by a person other than the President, attach hereto a certified copy of that section of Corporate By-Laws or other authorization by the Corporation that permits the person to execute the offer for the corporation.)

B. Sole Proprietor:

The Contractor is a Sole Proprietor. If the Contractor does business under an Assumed Name, the

Assumed Name is _____, which is registered with the Cook County Clerk. The Contractor is otherwise in compliance with the Assumed Business Name Act, 805 ILCS 405/0.01, et. seq.

C. Partnership:

The Contractor is a Partnership which operates under the name _____

The following are the names, addresses and signatures of all partners:

_____ _____ Signature	_____ _____ Signature
-----------------------------	-----------------------------

(Attach additional sheets if necessary.) If so, check here _____.

If the partnership does business under an assumed name, the assumed name must be registered with the Cook County Clerk and the partnership is otherwise in compliance with the Assumed Business Name Act, 805 ILCS 405/0.01, et. seq.

SECTION VII
COMPLIANCE AFFIDAVIT

I, _____, (Print Name) being first duly sworn on oath depose and state:

1. I am the (title) _____ of the Proposing Firm and am authorized to make the statements contained in this affidavit on behalf of the firm;
2. I have examined and carefully prepared this Proposal based on the request and have verified the facts contained in the Proposal in detail before submitting it;
3. The Proposing Firm is organized as indicated above on the form entitled "Organization of Proposing Firm."
4. I authorize the Village of Oak Park to verify the Firm's business references and credit at its option;
5. Neither the Proposing Firm nor its affiliates¹ are barred from proposing on this project as a result of a violation of 720 ILCS 5/33E-3 or 33E-4 related to bid rigging and bid rotating, or Section 2-6-12 of the Oak Park Village Code related to "Proposing Requirements."
6. The Proposing Firm has completed the M/W/DBE status indicated below on the form entitled "EEO Report."
7. Neither the Proposing Firm nor its affiliates are barred from enter into an agreement with the Village of Oak Park because of any delinquency in the payment of any debt or tax owed to the Village except for those taxes which the Proposing Firm is contesting, in accordance with the procedures established by the appropriate revenue act, liability for the tax or the amount of the tax. I understand that making a false statement regarding delinquency in taxes is a Class A Misdemeanor and, in addition, voids the agreement and allows the Village of Oak Park to recover all amounts paid to the Proposing Firm under the agreement in civil action.
8. I am familiar with Section 13-312 through 13-3-4 of the Oak Park Village Code relating to Fair Employment Practices and understand the contents thereof; and state that the Proposing Firm is an "Equal Opportunity Employer" as defined by Section 2000(E) of Chapter 21, Title 42 of the United States Code and Federal Executive Orders #11246 and #11375 which are incorporated herein by reference. **Also complete the attached EEO Report or Submit an EEO-1.**
9. I certify that the Firm is in compliance with the Drug Free Workplace Act, 41 U.S.C.A, 702

Michelle L. Thoma-Culver

¹ Affiliates means: (i) any subsidiary or parent of the agreeing business entity, (ii) any member of the same unitary business group; (iii) any person with any ownership interest or distributive share of the agreeing business entity in excess of 7.5%; (iv) any entity owned or controlled by an executive employee, his or her spouse or minor children of the agreeing business entity.

SECTION VIII
M/W/DBE STATUS AND EEO REPORT

Failure to respond truthfully to any questions on this form, failure to complete the form or failure to cooperate fully with further inquiry by the Village of Oak Park will result in disqualification of this Proposal.

1. Contractor Name: _____

2. Check here if your firm is:

- ☐ Minority Business Enterprise (MBE) (A firm that is at least 51% owned, managed and controlled by a Minority.)
- ☐ Women's Business Enterprise (WBE) (A firm that is at least 51% owned, managed and controlled by a Woman.)
- ☐ Owned by a person with a disability (DBE) (A firm that is at least 51% owned by a person with a disability)
- ☐ None of the above

[Submit copies of any M/W/DBE certifications]

3. What is the size of the firm's current stable work force?

_____ Number of full-time employees

_____ Number of part-time employees

4. Similar information will be requested of all sub-contractors performing work pursuant to the applicable agreement. Forms will be furnished to the lowest responsible contractor with the notice of agreement award, and these forms must be completed and submitted to the Village before the execution of the agreement by the Village.

Signature: _____

Date: _____

EEO REPORT

Please fill out this form completely. Failure to respond truthfully to any questions on this form, or failure to cooperate fully with further inquiry by the Village of Oak Park will result in disqualification of this Proposal. An incomplete form will disqualify your Proposal.

An EEO-1 Report may be submitted in lieu of this report

Contractor Name Elevate Energy
Total Employees 265

					Males				Females				
Job Category	Total # of Empl.	Total Males	Total Females	Black	Hispanic	American Indian	Alaskan Native	Asian & Pacific Islander	Hispanic	American Indian	Alaskan Native	Asian & Pacific Islander	Total Minorities
Officials & Managers	97	36	61	15	7	0	0	1	9	1	0	2	35
Professionals	168	84	84	45	20	0	0	7	17	0	0	6	95
Technicians													
Sales Workers													
Office & Clerical													
Semi-Skilled													
Laborers													
Service Workers													
Management Trainees													
Apprentices													

This completed and notarized report must accompany your Proposal. It should be attached to your Affidavit of Compliance. Failure to include it with your Proposal may disqualify you from consideration.

Michelle L. Thoma-Culver, being first duly sworn, deposes and says that he/she is
(Name of Person Making Affidavit)

Corporate Secretary of **Elevate Energy** and that
the above EEO
(Title or Officer)

Report is true and accurate and is submitted with the intent that it be relied upon.

Michelle L. Thoma-Culver
(Signature)

June 2, 2025
(Date)

**SECTION IX
REFERENCES AND LIST OF ENTITIES
FOR WHICH SERVICES HAVE BEEN PERFORMED**

Contractors shall furnish at least three (3) entities, preferably municipalities, that have used the Contractor's for similar services within the last three (3) years.

REFERENCES:

1. Name of Entity	City of Ann Arbor, MI
ADDRESS	301 E. Huron Street
	Ann Arbor, MI 48104
CONTACT	Missy Stults, PhD, Sustainability and Innovations Director
PHONE AND EMAIL ADDRESS	(734) 749-6430 mstults@a2gov.org
WORK PERFORMED	Elevate has worked with the City of Ann Arbor to raise funding and provide a one-stop-shop delivery of home upgrades to 272 homes. Upgrades include home repair, drainage and water damage remediation, energy efficiency, electrification, solar, and district geothermal system support.
2. Name of Entity	City of Madison, WI
ADDRESS	210 Martin Luther King Jr. Blvd
	Madison, WI 53703
CONTACT	Jessica Price, PhD Sustainability and Resilience Manager
PHONE AND EMAIL ADDRESS	(608) 267-1922 jprice2@cityofmadison.com

**WORK
PERFORMED**

In partnership with Sustain Dane, a local not for profit organization, Elevate implemented the Efficiency Navigator program in Madison, Wisconsin.

The Efficiency Navigator program helps the owners of small to medium-size multi-family housing make their buildings more efficient and resilient.

3. Name of Entity

City of Evanston

ADDRESS

2100 Ridge Ave

Evanston, IL 60201

CONTACT

Cara Pratt, Sustainability and Resilience Manager

**PHONE AND
EMAIL ADDRESS**

847-448-8199 cpratt@cityofevanston.org

**WORK
PERFORMED**

Elevate designed and implemented Evanston Green Homes as a one-stop shop for single- and multifamily energy retrofits using a human-centered approach to community engagement and service delivery and leveraging utility programs and incentives along with statewide residential energy efficiency initiatives to deliver phased, assessment-based installations aligned with the City of Evanston's 2050 carbon-neutrality goals and scalable for future program iterations.

LIST OF MUNICIPALITIES OR GOVERNMENT AGENCIES FOR WHICH THE CONTRACTOR HAS PROVIDED SERVICES DURING THE PAST FIVE (5) YEARS IF NOT NAMED ABOVE.

1. Municipality

City of Detroit

ADDRESS

2 Woodward Avenue

Detroit, MI 48226

CONTACT

Joel Howrani-Heeres, Director of Sustainability

PHONE AND
EMAIL ADDRESS

(313) 444-2146 howraniheeresj@detroitmi.gov

WORK
PERFORMED

Elevate supported the Detroit Solar Neighborhoods program where

the organization partnered with the city and the local utility to maximize the community benefits

by pairing it utility incentives in addition to upgrades in home repair, efficiency and solar

installation work. Elevate was responsible for the assessment and construction of 150 homes.

2. Municipality

City of Chicago

ADDRESS

121 North LaSalle Street, 10th Floor

Chicago, IL 60602

CONTACT

Steph O'Connor, Project Manager

PHONE AND
EMAIL ADDRESS

(312) 742-0437

WORK
PERFORMED

Elevate is one of the administrators for the Green Homes Chicago program

, launched by the City of Chicago's Department of Housing to provide up to \$50,000 in free home energy upgrades and

energy efficiency retrofits for income-eligible homeowners.

Appendix B – Resumes



ELEVATE

Equity through climate action

Mark Milby

Email: Mark.Milby@ElevateNP.org

Phone: 678.787.8597

Professional Experience

Senior Director, Programs

2024 – present

Elevate, Chicago, IL

- Responsible for leading equitable building decarbonization strategies, including policy development, fundraising, braiding and leveraging multiple funding streams, leading technical stakeholder engagement on innovative technologies, and advising on best practices.

Manager / Senior Program Manager, Research & Development

2018 – 2024

Commonwealth Edison Company (ComEd), Oakbrook, IL

- Responsible for all aspects of \$10M+ annual portfolio of research and pilot initiatives.
- Led innovation strategy for a wide range of Customer Solutions initiatives, including building electrification, emerging technologies, market transformation, and next-gen program models.
- Led a team of four engineers/program managers and eight contractors to execute a robust portfolio of 30-40 research and pilot projects annually involving dozens of external partners.
- Received Powering Lives award from CEO Gil C. Quiniones in 2023 for role in jump-starting the utility's energy efficiency/building electrification research and programs, as well as 2023 Powering Together and Innovation Leader awards.

Program Manager / Senior Program Associate

2013 – 2018

Midwest Energy Efficiency Alliance (MEEA), Chicago, IL

- Led a team of program staff in the delivery of the Building Operator Certification® training program to eleven Midwestern states and thousands of graduates.
- Facilitated stakeholder workshops and events on best practices in energy efficiency program design.
- Promoted innovative commercial & industrial efficiency efforts and used the latest research to combat a regional wave of industrial opt-out policies.
- Supported industry teams in building science research through the US DOE Building America program.

Education

Master of Public Affairs, Sustainable Development

2011-2013

Indiana University, O'Neill School of Public and Environmental Affairs

Bloomington, IN

Bachelor of Science, Ecology

2006-2010

University of Georgia, Odum School of Ecology

Athens, GA

**ELEVATE**

Equity through climate action

Paula McGuire-Rowe

Email: paula.mcguire-rowe@elevatenp.org**Phone:** 773-807-9130**LinkedIn:** [Paula McGuire-Rowe | LinkedIn](#)

Biography

Paula McGuire-Rowe is the Associate Director of Community Partnerships at Elevate, a nonprofit organization committed to implementing programs that deliver clean and affordable heat, power, and water to homes and communities. In her capacity, Paula coordinates initiatives that unite families, building owners, and community partners to advance energy education. Additionally, overseeing initiatives focused on energy efficiency, renewables, and smart technology, she ensures alignment with the organization's goals. Collaboration stands as a cornerstone of her approach, as she collaborates closely with stakeholders to forge partnerships and amplify impact. Methodically designing and refining programs to address community needs, Paula navigates strategic planning to guide direction and adapt to changing circumstances effectively. Through these concerted efforts, Paula aims to foster a meaningful and enduring impact on communities.

Paula is an expert in building strategic partnerships. Before joining Elevate, she worked at the Greater Chicago Food Depository as a Senior Manager of Community Engagement in Chicago.

Professional Experience

Associate Director of Community Partnerships

May 2024- Present

Elevate, Chicago, IL

- Designed and implemented innovative projects to engage families, building owners, and community partners in energy education, efficiency, renewables, and smart technology.
- Led community engagement and outreach efforts across residential, multi-family, non-profit, and community-based programs, fostering partnerships with foundations, government entities, and funders.
- Developed and implemented strategies to empower communities to advocate for their energy needs, resulting in measurable outcomes and increased access to job opportunities.
- Managed day-to-day operations including program design, funder communications, RFP responses, partner/client support, strategic planning, project management, staff supervision, and metrics/reporting.
- Collaborated with the leadership team to support management, training, and organizational development initiatives.

Senior Manager of Community Engagement

June 2019 – May 2024

Greater Chicago Food Depository, Chicago, IL

- Championed trauma-informed relationship-building training, fostering meaningful collaborations that significantly improved nutrition access, and provided vital support to individuals and families in need.
- Directed a team of six Community Engagement Specialists, focusing on the expansion of educational outreach initiatives and the strengthening of partnerships with key community organizations.
- Skillfully managed and oversaw grants, programs, events, and outreach initiatives, ensuring alignment with organizational goals and optimizing impact and effectiveness for the communities served.

- Proactively cultivated and nurtured partnerships with a diverse array of stakeholders, including agency partners, community organizations, faith institutions, and others, leveraging subject matter expertise to facilitate meaningful collaboration and information sharing.
- Informed key stakeholders, including government employees, politicians, and donors, about the intricacies of food insecurity and the spectrum of potential solutions, fostering educated decision-making and amplifying support for the cause.
- Worked closely with the Food Depository Community Impact department, providing essential training and technical assistance in reporting requirements, program operations, volunteer recruitment, succession planning, resource management, transportation, and food safety to food distribution partners.
- Developed and executed innovative partner and community strategies, including organizing Townhalls, conducting Focus Groups, onboarding new partners, hosting webinars, and coordinating special events and activities, such as Hunger Action Month and Community Impact Day, to engage stakeholders and promote advocacy efforts.
- Delivered compelling public speaking engagements for diverse audiences, maximizing community engagement and support through clear communication and impactful messaging.

Assistant Project Manager

May 2018 – Nov 2018

Aldridge Electric, Chicago, IL

- Implemented the ComEd Facility Enhancement Program at Franklin Park Substation with a contract value of \$1.9 million; oversaw project progress, compliance with contractual terms, and reported performance metrics to stakeholders.
- Managed materials procurement and quality inspection aligned construction activities with approved drawings and tracked budget and resource utilization.
- Maintained safety protocols and work practices, ensuring on-time, on-budget project completion while minimizing risks and conflicts.

Retention Manager (Promoted)

June 2015 – April 2018

Family Health Network, Chicago, IL

- Promoted to role of Retention Manager, established department policies and led a team of six Retention Management Representatives. Conducted bi-weekly team meetings and organized quarterly training sessions for skill development, aligning with organizational objectives.
- Managed the Redetermination Department at Family Health Network, responsible for Medicaid and SNAP benefits renewal processes. Oversaw annual eligibility verification for Medicaid and bi-annual renewal for SNAP.
- Achieved a customer retention rate of 96%, reduced churn, and optimized renewal processes by implementing customer-focused strategies.
- Developed annual goals and KPIs using data analytics, internal reports, and customer feedback to drive departmental improvement.
- Led customer engagement and retention efforts by analyzing metrics to understand reasons for coverage loss, resulting in improved benefits packages and marketing strategies.

Senior Community Outreach Representative

March 2011 – June 2015

- Orchestrated community initiatives including charity events, mobile health fairs, and educational programs, demonstrating dedication to community well-being.
- Designed and implemented B2B and B2C outreach strategies, building strong relationships with nonprofit, faith-based, and advocacy groups to boost health plan awareness and adoption.
- Educated individuals and families on preventive care and healthy living, utilizing community partnerships to expand client base and positively affect public health metrics.
- Consistently onboarded 100+ new members monthly, resulting in a 129% sales growth, affirming the efficacy of targeted community outreach and engagement strategies.

Education

Master of Business Administration, Marketing (MBA) | University of Phoenix, Phoenix, AZ.

Bachelor of Science, Management (BSM) | National Louis University, Chicago, IL.



ELEVATE

Equity through climate action

Dara Reiff, PMP

Email: Dara.Reiff@ElevateNP.org

Phone: 773.321.2668

Professional Experience

Director, Nonprofit & Public Sector Programs

2025 - present

Elevate, Chicago, IL

- Supervise delivery of programs and initiatives designed to serve public sector and nonprofit customers in achieving their decarbonization goals
- Lead department planning, budgeting, and staffing. Manage team of project managers and other support staff to ensure deliverables are met
- Serve as Principal Investigator and Project Sponsor on several large projects supported by both public and private funds
- Manage funder relationships, lead and support business development efforts across the organization

Associate Director, Nonprofit & Public Sector Programs

2022 – 2025

Elevate, Chicago, IL

- Managed team that implemented a variety of programs serving nonprofit and public sector stakeholders
- Work across the organization to support departmental business development and strategy
- Support the City of Chicago in progressing towards their climate goals including stakeholder engagement activities, data analysis, policy planning, and fundraising

Senior Manager, Nonprofit Programs

2019 – 2022

Elevate, Chicago, IL

- Oversaw team of energy analysts, project leads, and construction managers that implements energy efficiency projects for hundreds of nonprofit organizations annually
- Managed funder relationships including financial forecasting, progress reporting, and KPI tracking
- Led business development and raise funds to grow energy programs that serve the nonprofit community
- Managed \$3M annual program budget including utility contract requirements, resource planning, and grant-making administration

Nonprofit Program Manager

2017 – 2019

Elevate, Chicago, IL

- Assisted nonprofit organizations in implementing energy and water efficiency measures
- Managed partnerships with program funders, utilities, industry organizations, financial institutions and community leaders to grow opportunities for energy efficiency in nonprofit facilities
- Ensured timely reporting both internally and externally
- Identified additional funding sources for the program to ensure long-term financial sustainability

Nonprofit & Public Sector Project Lead

2014 - 2017

Elevate, Chicago, IL

- Served as Project Manager for delivery of energy efficiency upgrades to nonprofit organizations to cut electric, natural gas, and water use
- Led energy planning projects for state, regional, and local units of government to develop energy, sustainability, and climate action plans
- Implemented stakeholder engagement activities that incorporate community interest and involvement with comprehensive energy planning efforts

Outreach Coordinator

2012 – 2014

Elevate, Chicago, IL

- Served as communications lead for building efficiency programs including residential and commercial retrofit services
- Led outreach efforts including material development, speaking engagements, web and social media presence, and marketing strategy with key partners

Sustainability Coordinator

2009 – 2012

College of Lake County, Grayslake, IL

- Developed institutional Sustainability and Climate Action Plan for greenhouse gas emissions reduction, policy implementation and metric tracking
- Managed Community Partners for Sustainability in Lake County, a 300+ member coalition of local professionals, businesses, municipalities, and community organizations to engage in community sustainability efforts
- Contributed to state-wide dissemination of community college sustainability and workforce training programs through the Illinois Green Economy Network

Education

Project Management Professional, Project Management Institute, 2015

Bachelor of Arts, Urban and Regional Planning, University of Illinois, Urbana-Champaign, Illinois, 2009

Sustainable Development Concentration

Spanish Minor

**ELEVATE**

Equity through climate action

Lindsey Wade

Email: lindsey.wade@elevatenp.org**Phone:** 872-310-3574**LinkedIn:** [linkedin.com/lindseywadechicago](https://www.linkedin.com/company/lindseywadechicago)

Biography

Lindsey Wade is the Senior Associate, Public Sector at Elevate, a nonprofit organization that designs and implements programs that bring clean and affordable heat, power, and water to homes and communities. In this role, Lindsey leads cross-functional teams to implement residential retrofit and electrification programs, optimizes funding strategies, monitors funding compliance, develops financial and performance reports, cultivates strategic partnerships, and designs community engagement strategies to expand program impact and support climate-resilient affordable housing.

Prior to joining Elevate, Lindsey secured 12+ years of cross-sector experience in community development, affordable housing, and climate justice, supported by a Master's in Public Administration. She's recognized in the public sector for her work on housing policy reform and economic development initiatives to address housing inequities and promote inclusive urban planning. Prior to this, Lindsey cultivated a donor base invested in coalition building and stewarded multiple philanthropic funding sources on behalf of homelessness organizations. In her free time, Lindsey enjoys making home improvements and spending time with her family and pets.

Professional Experience

Senior Associate, Public Sector

5/2024-Present

Elevate, Chicago, IL

- Led a cross-functional team of five to deliver a \$1.3M federally funded residential retrofit and building electrification program to upgrade climate-vulnerable housing structures in environmental justice communities
- Optimized funding and financing strategies to manage tight labor and construction budgets, ensuring compliance across multiple funding streams with precise forecasting, monitoring, and resource frameworks
- Developed high-level financial and performance reports for stakeholders, providing strategic insights on program milestones, challenges, and outcomes, while ensuring alignment with organizational objectives
- Created strategic scopes of work and leveraged resilient site design approaches to enhance health, safety, weatherization, and energy efficiency for affordable housing properties
- Leveraged utility rebates, philanthropic opportunities, partner programs, and state-funded initiatives to maximize project funding capacity
- Cultivated strategic partnerships with public agencies, elected officials, clients, and community organizations to scale program impact, advance affordable housing preservation, and support climate resilience
- Engineered community engagement strategies to expand program reach, attract funding, and strengthen community capacity for advancing affordable housing and climate resilience
- Officiated departmental process improvement strategies to align goals and objectives across programs

Policy Analyst, Housing & Economic Development

1/2023-1/2024

City of Evanston, Evanston, Illinois

- Directed comprehensive housing policy and municipal code reforms on behalf of a racially and economically diverse small city, including decennial Landlord-Tenant Ordinance update and tri-annual Inclusionary

Housing Ordinance update to align with federal and regional equity-driven regulations and to advance fair and affordable housing initiatives

- Oversaw the execution of a \$1.5M CDBG grant to drive the development of affordable multifamily housing and public infrastructure improvements, and to advance economic justice objectives
- Led in-depth research on housing policies and market trends, utilizing U.S. Census data, evidence-based publications, and practitioner interviews to inform strategic decisions, optimize resource allocation, and drive equitable access to housing opportunities
- Authored high-level strategic memoranda and delivered executive presentations to legislative committee of 9 on innovative housing and land use policies
- Crafted strategic grant narratives to secure funding for land use and comprehensive plan updates, addressing the city's redlining legacy and advancing equity-driven urban planning initiatives that enhance affordable housing access and foster long-term community investment
- Led legislative processes for housing policy updates, fostering inclusive civic engagement with key stakeholders to shape a regulatory environment that ensured equitable and actionable policy outcomes
- Produced HUD-compliant strategic and consolidated plans, including performance and evaluation reports detailing the allocation of \$6M across the community development department

Development Manager, Community Engagement

11/2020-1/2023

Connections for the Homeless, Evanston, Illinois

- ✎ Led a high-performing team of 8 key shelter volunteers and a support staff member across four shelter sites to streamline and enhance operational efficiency of robust community engagement program and achieve capital campaign objectives
- ✎ Cultivated a diverse volunteer network of over 1,200 individuals across faith, education, and corporate sectors, to deepen community engagement and secure private, institutional, and philanthropic donations
- ✎ Negotiated funding agreements and partnerships with the City of Evanston (\$1.5M) and Greater Chicago Food Depository (\$7.5k), establishing sustainable revenue streams and enhancing program capacity
- ✎ Secured \$200K in annual funding through a robust volunteer and community engagement program, leveraging grants, sponsorships, in-kind donations, and donor cultivation to support organizational programs
- ✎ Championed equitable departmental policies and procedures, redistributing workloads from staff to volunteers and reducing barriers for program participants to access in-kind donation resources
- ✎ Delivered executive-level presentations and training on the organization's mission and trauma-informed approaches to homelessness mitigation
- ✎ Strategically planned and executed high-impact events, including holiday and philanthropic gatherings, by managing timelines, volunteer roles, outreach, scheduling, training, and supervising execution

Case Manager

8/2012-10/2020

Howard Area Community Center, Chicago, Illinois

- ✎ Reduced recidivism and improved access to support services through comprehensive case management of 30 participants monthly in prison reentry and workforce development programs.
- ✎ Facilitated monthly job and college readiness workshops as a certified Adult Education Instructor, developing lesson plans, administering Tests of Adult Basic Education, and tailoring materials to participant needs.
- ✎ Maintained 100% grant compliance across programs funded by IDOC Parole Reentry Group, CSAC, ICCB, and CCC by adhering to all requirements and reporting standards.
- ✎ Fostered cross-sector collaboration through monthly capacity-building meetings with public administrators, law enforcement, healthcare providers, and community-based organizations.
- ✎ Streamlined service delivery for justice-involved participants by leading discussions with stakeholders to identify and address shared challenges, improving access to resources.
- ✎ Secured ongoing financial support from federal, state, and local agencies through comprehensive monthly performance reports highlighting program successes and impacts.

- ✧ Designed and implemented a data-driven tracking system to monitor participant progress, enhancing case management strategies and ensuring personalized support.
- ✧ Delivered trauma-informed care and cultural competency training to staff and volunteers, strengthening engagement and improving service delivery outcomes.

Education

Master of Public Administration, 12/2020, University of Illinois at Chicago

Bachelor of Arts, Sociology, 5/2012, University of Illinois at Chicago

Michael Ihesiaba

Email: Michael.Ihesiaba@ElevateNP.org

Phone: 773.938.4511

Professional Experience

Senior Director, Engineering

Elevate, Chicago, IL

2021 – present

- Leads, manages and oversees Elevate's Engineering team, working on projects such as:
 - Beneficial Electrification
 - Illinois Solar for All (ILSFA)
 - Decarbonization
 - Passive homes
 - Net-zero Homes
 - ASHRAE-level assessments and reporting
 - High-performance buildings
 - Solar
 - Indoor air quality
 - Utility energy incentive programs
- Manages workflow related to serving energy efficiency programs and green consulting services
- Leads strategic planning efforts for meeting resource needs and team growth
- Collaborates across the organization to ensure engineering deliverables are completed on time and within budget.
- Develops engineering scope of work in close collaboration with Elevate's project managers, program managers, and directors.
- Oversees delivery of energy, water, and renewable energy assessments of commercial, multifamily, and public buildings.
- Provides mentoring and training opportunities for staff on auditing, energy modeling, and engineering practices to improve the team's technical capabilities.

Senior Manager

ICF, Chicago, IL

2017 – 2021

- Provided strategic governance and consulting for Commonwealth Edison's energy efficiency programs.
- Fully responsible for the contractual management of Commonwealth Edison's Custom and Streetlighting Energy Efficiency programs. \$25M annual project oversight. Over \$100M total oversight
- Managed a diverse team of professionals and multi-million dollar contracts.
- Developed Key Performance Indicators (KPIs) and Service Level Agreements (SLAs).
- Provided overall PMO governance and oversight to ensure compliance to client standards and drive excellent execution. Enable effectiveness and productivity by providing insight, plans, processes, and tools to deliver cross-functional initiatives at scale.
- Developed Key Performance Indicators (KPI)/metrics, standard Service Level Agreements (SLAs), Service Catalog and create reporting mechanisms.

Operations Manager, Engineering, Measurement and Verification

Consolidated Edison, NY, NY

2011 – 2017

- Managed a team of 8 Engineers in the analysis, calculation, measurement, and verification of Con Ed's Energy Efficiency and Demand Management program portfolio.
- Managed 6 contracts worth \$7M for engineering assistance towards the Con Ed energy efficiency program portfolio.

- Directed and coordinated continuous statewide standardization of acceptable engineering practices, calculations, and documentation.
- Directed and coordinated engineering support for corporate Research and Development (R&D)
- Developed overall concepts for the integration of new technology and products.

Program Operations Manager, Energy Efficiency and Demand Management

2009 – 2011

National Grid, Melville, NY

- Responsible for all energy efficiency program offerings for all colleges and universities within National Grid's territory. Over 30 major accounts.
- Developed National Grid's Long Island Small Business energy efficiency program.
- Responsible for managing budgets, personnel, engineering, marketing, customer acquisition, and QA/QC.
- Developed potential studies for strategic portfolio growth

Engineering Project Manager

2007 – 2009

Lehr Consultants International

- Directed Engineering team for an international consulting firm while managing personnel, budgets, projects, and QA/QC.
- Engineering lead for sustainable mechanical, electrical, and plumbing design strategies for hotels, schools, residents, both domestic and international.

Education

B.S., Mechanical Engineering, THE GROVE SCHOOL OF ENGINEERING, CITY COLLEGE OF NEW YORK
MBA, NEIL GRIFFIN COLLEGE OF BUSINESS - ARKANSAS STATE UNIVERSITY

Certifications

Certified Energy Manager (CEM), Association of Energy Engineers – 2010 – Present
Certified Measurement and Verification Professional (CMVP) – 2012 – Present

**ELEVATE**

Equity through climate action

Erik Loarca**Email:** Erik.Loarca@ElevateNP.org**Phone:** 708.856.2007**Professional Experience****Project Manager, Building Electrification****2022 – Present**

Elevate, Chicago, IL

- Manage BEP's single-family portfolio – \$1.5 million budget
- Work closely with BEP Director to meet program reporting requirements (internal and external) on a timely basis
- Support the development and implementation of program work plans to achieve funder deliverables by managing metrics, risks, and adjustments to work plans
- Lead program application and intake process for single-family electrification retrofits, including development of SOPs for intake assessment, RFP, cases and construction
- Lead and maintain Salesforce object records with new and ongoing projects
- Develop and maintain strong relationships with internal and external teams
- Collaborate with construction and workforce team members in meeting contractor resource needs, fulfilling agreement requirements, scheduling and completing repair work
- Ensure projects comply with Elevate's operational processes and project management tools such as the ERP system, Salesforce, etc.
- Engage nonprofit and for-profit developers and CIC clients for all-electric gut rehabs/major renovation opportunities

Senior Project Lead**2020 – 2022**

Elevate, Chicago, IL

- Manage project implementation (customer intake, relationship building, incentive application processing, project coordination and oversight) of portfolio's managed
- Document progress of assigned projects and keep up-to-date activity for program transparency
- Assist a network of contractors with business development and drive implementation of energy-saving measures
- Track key metrics related to data quality and customer experience
- Meet production performance metrics to help program achieve monthly and yearly goals
- Provide subject matter expertise to the team on various aspects of program delivery
- Help determine and incorporate continuous process improvement into program procedures
- Mentor more junior staff and assist the project deliver manager in day-to-day activities

Project Lead**2018 - 2020**

Elevate, Chicago, IL

- Support the Electrification Program efforts as the primary point of contact for projects from beginning to end by working with the construction and engineering team to ensure requirements are met
- Identify energy savings associated with potential upgrades for IEMS and NPO Programs resulting in a combined \$4.12 million in incentives, 3.11 million kWh savings and 378,699 therms in savings
- Manage relationships with over 50 affordable housing and nonprofit property owners representing over 100 properties / 1000 units in Illinois and explaining savings, and create visuals that illustrates performance and other important metrics

- Act as a direct point of contact for diverse pool of contractors and support the construction phase as well as the close out process
- Supporting the Research & Innovation team to complete the Gas Stoves Whitepaper by conducting desktop research and external interviews with 5 property owners
- Contributing to the technical development of the water efficiency service under the National Strategic Engagement team by conducting an in-depth initial water analysis and manipulating data to identify water usage and cost trends in affordable housing properties
- Ensuring 24 affordable housing and nonprofit properties comply with the City of Chicago and Evanston Energy and Water Benchmarking ordinances for two consecutive years
- Working with the Chief Finance Officer on the Harvey Streetlighting Project by conducting high level analysis on costs of LED lighting installation for the Township and identified which light posts would qualify for replacement under the Harvey Streetlight Project
- Leading Elevate's inaugural DREI Committee as its first Co-Chair by developing the action plan process, working closely with the Morten Group, acting as committee liaison with Elevate leadership, and co-facilitate company-wide meetings

Energy Solutions Analyst

RealPage Inc, Lombard, IL

2018

- Analyzed energy consumption data to identify any potential billing, rate or consumption issues and quickly resolve any problems
- Evaluated energy efficiency measures for properties
- Reviewed and evaluated of ROI for projects in the East Coast
- Performed benchmarking assessments, create utility budgets, visuals, and related reports for clients' properties across the country via Excel

Education, Certifications, & Skills

- B.A., Social & Environmental Studies, UIUC, 2017
- GIS Certification, 2017
- LEED Green Associates, 2021
- Salesforce
- Analytics
- Spanish Language

**ELEVATE**

Equity through climate action

Javier Gonzalez

Email: Javier.Gonzalez@ElevateNP.org**Phone:** 773.321.2685

Biography

Javier Gonzalez is the Senior Director of Technical and Construction Services at Elevate, a nonprofit organization that designs and implements programs that bring clean and affordable heat, power, and water to homes and communities. In this role, he supports and oversees a team of technical staff, project delivery leads, and construction experts that serve our Environmental Health, Water, Decarbonization and Efficiency programs.

Mr. Gonzalez is an energy efficiency expert with more than 20 years of experience in diverse roles including construction management and utility program design and management.

In his free time, he enjoys traveling and spending time with his family.

Professional Experience

Sr Director of Tech and Construction Services

2024- Present

Director of Tech and Construction Services

2023- 2024

Elevate, Chicago, IL

Elevate's Director, Technical and Construction Services supports the design and implementation of Elevate's portfolio of building programs by overseeing teams of technical staff, project delivery leads, and construction experts as they provide technical expertise in support of Elevate's Environmental Health, Water, Decarbonization and Efficiency programs.

Associate Director of Tech and Construction Services

2020- 2022

Elevate, Chicago, IL

The Associate Director is responsible for ensuring technical compliance and quality program delivery of technical and construction services to ensure all programs and projects at Elevate have access to technical resources. This role is also accountable for helping develop new services and mentoring and training technical and construction staff.

Senior Manager of Technical Services

2017- 2020

Elevate, Chicago, IL

Supported Elevate's portfolio of building programs by engaging in the project lifecycle including RFP development, program design and implement, quality control of production and development of new services such as building optimization, water efficiency and solar services.

Technical Manager

2016-2017

Elevate, Chicago, IL

- Managed and developed the IPA PY9 Elevate Assisted Living and Senior Housing Peak Reduction Programs.
- Performed project specific engineering and analysis tasks including design review, energy modeling, energy and water use analysis, data validation, etc.
- Supported quality assurance plans, reviews energy analysis reports and other deliverables.
- Assisted with new application development (i.e. tools that assist energy analysts in collecting, analyzing, and reporting on energy efficiency data faster and more efficiently)
- Assisted with program design and business development efforts in Chicago and new markets.
- Assisted with program launch and creation /launch of technical approach for retrofit project
- Conducted ASHRAE Level 1 and/or 2 energy audits of commercial, multifamily, and municipal buildings and writes audit reports
- Calibrated our in-house designed approach against a more sophisticated modeling approach;
- Supported TRM Proceedings and efforts to improve the TRM for Elevate's key strategies and in line with programs and business strategy

Senior Energy Analyst

2014-2016

Energy Analyst

2013-2014

Elevate, Chicago, IL

- Managed and developed the IPA Multifamily Electric Heat retrofit program PY7 and PY8.
- Conducted on-site energy assessments of multifamily rental properties and developed retrofit work scopes
- Determined energy savings and paybacks of energy conservation measures with modeling tools
- Provided technical consulting to program participants, i.e. property owners, property managers, developers, and other project partners
- Communicated with building owners and contractors to oversee construction management

Field Technician

2011-2013

Energy Reduction Inc Evanston, IL

- Organized and conducted lighting retrofits in commercial buildings in the Chicagoland area
- Implemented various energy conservation measures in commercial and residential buildings
- Performed Weatherization work in single family and multifamily residential buildings

Additional Skills

- Fluent in spoken and written Spanish

Education

- Wright College, Building Energy Technologies Program, 2011

Professional Certifications

- Certified Building Analyst, Building Performance Institute (2011)
- Certified Building Operator (2011)

**ELEVATE**

Equity through climate action

Michael Gatto

Email: Michael.Gatto@elevatenp.org**Phone:** +1 312-820-2301**LinkedIn:** <https://www.linkedin.com/in/michael-gatto-a965099/>

Biography

Michael Gatto is the Construction Manager for Building Electrification at Elevate, a nonprofit organization that designs and implements programs that bring clean and affordable heat, power, and water to homes and communities. In this role, Michael works closely with external construction contractors, and Elevate Program Management, Engineering, and Project Lead team members in the delivery of electrification projects.

Prior to joining Elevate, Michael was a Rose Architectural Fellow at Foundation Communities, and the Director of the Austin Community Design and Development Center in Austin, Texas. In his free time, Michael likes to run and bicycle and visit his ancestral homeland.

Professional Experience

Construction Manager, Building Electrification

June 2024 - present

Elevate, Chicago, IL

- Work closely with external contractors and Elevate Program Management, Engineering, and Project Lead team members in the delivery of building electrification projects.

Principal

June 2016 – June 2024

Archetype Community Development & Self-Employed Consultant, Wimberly TX

- Provided regenerative design and development services in the US and abroad specializing in affordable housing development project management and strategic planning.

Director

April 2006 – June 2016

Austin Community Design and Development Center, Austin TX

- Co-founded the Austin Community Design and Development Center (ACDDC), a 501(c)3 non-profit, in 2006. The mission of ACDDC was to improve the quality of life for all by providing sustainable design, planning, and development services to low and moderate income individuals, families, and neighborhoods and the organizations that serve them. Managed ACDDC as either Executive Director or Co-Director and Board President including all aspects of non-profit operations, such as fundraising and project management.

Project Manager/Rose Fellow

June 2003 – April 2008

Foundation Communities, Austin TX

- As an Enterprise Community Partners Rose Architectural Fellow provided architectural services as a Foundation Communities employee, including programming, design, and construction management for both community centers and housing with a focus on green building and sustainability issues.

Education

- Master of Architecture, Specialization in Sustainable Design, University of Texas at Austin, Austin TX, 2001
- Bachelor of Science, Chemical Engineering, Massachusetts Institute of Technology, Cambridge MA, 1982



ELEVATE

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Honnie A. Leinartas

Email: Honnie.Leinartas@ElevateNP.org

Phone: 872.205.1250

Public Service

Volunteer

2019 – present

Village of Oak Park Climate Action Planning Task Force, Oak Park, IL

- Collaborates with other fellow community members to inform local policymakers on equitable sustainability measures that provide high impact for energy efficiency within the village, influence the framework for a strong Climate Action Plan, and make recommendations for allocation of sustainability funds

Professional Experience

Manager, Engineer

2024 – Present

Senior Energy Engineer

2021 – 2024

Senior Energy Specialist

2019

– 2021

Elevate, Chicago, IL

- Manages and mentors a team of 1-2 engineers
- Leads the engineering support of the single-family 1-4 unit building electrification program by leading/conducting pre-electrification whole home energy assessments, performing projected energy and cost impact analysis, and supporting the creation of each home's electrification scope of work
- Installs and collects data from Indoor Air Quality monitoring equipment to monitor the impacts of electrification on indoor air quality
- Promotes relevance and streamlining of internal processes through collaborative updates to existing and creation of new standard operating procedures
- Contributes engineering expertise and support to internal and external partners on residential and commercial projects
- Works closely with teammates to leverage individual skillsets to complete time sensitive and/or critical projects effectively, efficiently, and on time
- Conducts peer review on energy audit reports for accuracy and provides feedback to ensure delivery of quality to the customer
- Performs tailored energy assessments for commercial and multifamily facilities in accordance with utility owned energy efficiency programs, ASHRAE Level 1 & 2, or other energy certification criteria, identifies energy and/or water savings opportunities, and produces reports on observations and recommendations including cost and savings implication analysis
- Led and facilitated inter-team collaboration and discussion to influence the evolution of the company as part of the Strategic Planning Advisory Panel
- Collaborated across teams on Energy Efficiency Program design and QA/QC of program measures, makes recommendations for additional energy efficiency opportunities, performs calculations and data analysis to inform savings projections and incentive levels for cost effectiveness annually
- Provided on demand support as a project lead for Energy Efficiency Program project production including RFP generation, contractor and/or customer engagement, and contractor interface from start to finish to complete projects within a curated production schedule
- Transformed Energy Efficiency Program production processes to sustain rapid increase to project pipeline workflow resulting in immediate improvement in performance

Architectural Designer

2016 –2019

Savane Properties, Inc., Chicago, IL

- Worked directly with clients, interior designers, construction managers, and building trades to design and provide support for the construction of both custom and spec luxury single-family homes from the ground up
- Responsible for complete construction, bidding, and permit documents and drawings using Autodesk Revit
- Responsible for specifying interior and exterior materials and finishes of custom and spec homes in accordance with project budgets
- Coordinated bid packages for various trades and responsible for end-to-end/bid-to-purchase pipeline

Architectural Designer/Building Information and Energy Modeler

2008 – 2016

Independent Contractor, Chicago, IL

- Performed energy modeling of multi-unit residential buildings to verify Energy Star V3 compliance using WrightSoft Right-Suite and REM/Rate
- Modeled large building heating and cooling loads to aid in HVAC equipment decision making using eQuest
- Produce as-built, demolition, and new construction/renovation drawing sets for interior designer
- Created custom components for us in Autodesk Revit models
- Produced custom architectural drawing services for residential projects and renovations
- Responsible for complete as-built drawings for electrical, data, and communications layouts using Autodesk AutoCAD

Researcher

2013 – 2014

The Built Environment Research Group at the Illinois Institute of Technology, Chicago, Illinois

- Researched and prepared data for simulation and analysis
- Simulated 10 different Chicagoland single-family housing typology groups to develop deep energy retrofit packages using the residential building energy modeling software, BEopt w/ EnergyPlus
- Utilized WUFI moisture analysis software to verify the moisture performance of non-standard wall construction

Job Captain/Project Architect Intern

2006 – 2008

Environs Development, Inc., Chicago, IL

- Worked closely with licensed project architects, interior design coordinators, and construction managers on high-end single-family residences to complete construction documents, including architectural drawing sets, preliminary framing, and MEP layouts and coordinated marketing drawings for public and client presentations
- Worked on site with construction managers to find solutions for construction problems and solved problematic design details

Education

- B.A., Architectural Studies, University of Illinois at Chicago, Chicago, IL, 2007
- M.S, Civil Engineering, Illinois Institute of Technology, Chicago, IL, 2014

Publications and Conference Presentations

- Leinartas HA. Best Practices in Community-Based Program Design for Paths to Single-Family Decarbonization. ACEEE 2021 National Conference on Energy Efficiency as a Resource, Philadelphia, PA.

- McCreery AC, Wordlaw L, Scheu R, Leinartas H, Philip W, Janet R, Liu L, Dunn S, and Tovar A. (2022) “Rapid Deployment of Energy Upgrades Through a Community-Scale Approach: Leveraging Partnerships to Achieve Equitable Clean Energy Goals.” ACEEE 2022 Summer Study on Energy Efficiency on Buildings
- Leinartas HA, Stephens B. Optimizing Whole House Deep Energy Retrofit Packages: A Case Study of Existing Chicago-Area Homes. *Buildings*. 2015; 5(2):323-353. URL: <https://www.mdpi.com/2075-5309/5/2/323>
- Leinartas HA. Optimization of Cost- Effective Whole House Retrofit Packages for Targeting 50% Annual Energy Use Reductions in Existing Chicagoland Homes. Engineering Sustainability 2015, Pittsburgh, PA.
- Leinartas HA. “Optimization of Whole House Retrofit Packages for Targeting 50% Annual Energy Use Reductions in Pre-1978 Chicagoland Homes.” Master’s Thesis, Illinois Institute of Technology, 2014. URL: http://built-envi.com/wp-content/uploads/2014/07/leinartas_h_masters_thesis_July_2014_FINAL.pdf



ELEVATE

Equity through climate action

Amy Jewel, LEED AP

Email: Amy.Jewel@ElevateNP.org

Phone: 510.343.9787

Professional Experience

Vice President, Programs

2023 – present

Elevate, Chicago, IL

- Manage the Illinois Solar for All program, a statewide initiative to provide the benefits of solar energy to income-eligible and environmental justice communities
- Lead energy efficiency, decarbonization, smart grid, and nonprofit & public sector teams to ensure high quality programs are delivered
- Oversee the organization's Program Support Team, which provides call center services and program support for participants from the 12 programs currently implemented by Elevate. Ensure daily KPIs are met and maintain high levels of customer satisfaction
- Collaborate across the organization on resourcing, staffing, budgeting, and developing standardized processes when possible

Director, Energy Efficiency and Smart Grid Programs

2022 – 2023

Elevate, Chicago, IL

- Oversee all aspects of utility energy efficiency and smart grid program design and implementation to meet and exceed utility expectations and deliver high customer satisfaction
- Develop and maintain relationships with utilities and key stakeholders and determine ways to collaborate to increase benefits to local communities
- Direct and mentor project management staff to ensure high quality programs are delivered and also share best practices across programs and with other departments to continue improving program delivery
- Work across teams to deploy resources efficiently and effectively toward organizational goals, work with staff to balance workload and effort, and provide regular feedback so that key staff can continuously improve their supervision and mentoring skills.

Associate Director, Energy Efficiency Program Implementation

2020 – 2021

Elevate, Chicago, IL

- Ensure successful delivery of utility energy efficiency programs focusing on income eligible multifamily properties, public housing facilities, and nonprofit organizations.
- Develop and implement program processes and policies, direct project management staff, and work with other department leaders to define, prioritize, develop, and design projects and programs.
- Facilitate learning and collaboration across programs, including identifying areas where successful program elements can be replicated or adapted across program and geographies to improve the impact of program delivery.
- Work with project managers, program managers, and directors to develop and oversee a program evaluation framework that is used as the basis to measure, monitor and evaluate programs; to assess program strength; and to identify areas for improvement.

Senior City Advisor, City Energy Project

Institute for Market Transformation / Chicago Mayor's Office

2014 – 2020

- Led creation, adoption, and implementation of the Chicago Energy Rating System, the first-of-its-kind building energy performance rating system in the U.S.
- Managed creation of the Chicago Property Assessed Clean Energy (PACE) financing program, with a focus on diversity and equity considerations.
- Served as liaison with internal and external sustainability stakeholders and represented the Mayor's Office at community meetings as well as local, regional, and national conferences.
- Supported passage of the City Council Resolution to achieve 100% clean energy by 2035.
- Implemented the Chicago Energy Benchmarking Ordinance, including overseeing stakeholder outreach and support, data analysis, and reporting annual results.
- Led the Retrofit Chicago Energy Challenge, the city's voluntary energy efficiency program.

Senior Sustainability Consultant

DNV (formerly DNV KEMA)

2011 – 2014

- Led development of over 25 climate and energy action plans for local government clients.
- Established a Local Carbon Fund for the City of Watsonville, CA to incentive net zero buildings.
- Analyzed the market for emerging technologies such as battery storage and smart grid devices.

Consultant and Green Team Leader

URS Corporation (now AECOM)

2007 – 2011

- Implemented the Green Business Program for the City of San Francisco's Dept. of the Environment.
- Provided technical assistance to the City of Oakland for the Energy and Climate Action Plan.
- Rolled out an internal Green Team program for the West Region (over 40 offices in 25 states).

Director of Development

Resource Renewal Institute

2001 – 2003

- Raised an annual budget of approximately \$500,000; maintained support from current funders and identified and obtained new sources of support. Managed all required funding reports.
- Edited and published quarterly newsletter. Performed administrative tasks.

Senior Consultant

Great Forest, Inc.

1999 – 2001

- Designed and implemented individualized solid waste and recycling plans for clients such as Merrill Lynch, Goldman Sachs, American Express, and Columbia University.
- Researched market trends, implemented or improved recycling programs, and managed the waste removal bid process for clients.

Education

- Masters of Environmental Science and Management, University of California Santa Barbara, 2007
- B.A., Psychology, Columbia University, 1999

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Jelene Britten

Email: Jelene.Britten@ElevateNP.org**Phone:** 773.269.2223**LinkedIn:** linkedin.com/in/jelenebritten

Jelene Britten is the Senior Director, Marketing, at Elevate, a nonprofit organization that designs and implements programs that bring clean and affordable heat, power, and water to homes and communities. In this role, Jelene directs marketing strategies to encourage people to enroll in innovative clean energy and water programs.

Jelene is an expert in integrated marketing communications and branding. Before joining Elevate, she worked at Adler University, the Ounce of Prevention Fund (now Start Early), and Chapin Hall at the University of Chicago.

Professional Experience

Senior Director, Marketing

2021-present

Elevate, Chicago, IL

- Directs marketing strategies to encourage people to enroll in Elevate's programs, including ComEd's Hourly Pricing, Illinois Solar for All, the Multi-Family Energy Savings program funded by the northern Illinois utilities, and the LeadCare programs that help child care providers address lead in drinking water.
- Oversees all marketing and communications plans for new and existing programs, including client relationships, project planning, staffing, budgeting, and branding.
- Manage a team of seven marketing professionals who implement marketing plans that achieve program goals.

Director of Communications

2018- 2021

Adler University | Chicago, IL

University that educates graduate students to advance social justice at Chicago, Vancouver, and Online campuses.

- Developed brand strategy and annual communications plans that increased the visibility of Adler University as a social justice leader among prospective students, donors, and civic leaders.
- Oversaw the development of a content strategy using brand storytelling and audience insights, which attracted prospective students, increased social media followers by 8% overall (including a 169% increase in Instagram followers), and doubled referrals from social media to the website news pages over three years.
- Launched a strategic development communications plan, engaging donors and alumni around mission-related stories and doubling donations to the Giving Tuesday 2020 fundraising campaign compared to previous year.
- Created new brand messaging to fuel a successful public relations plan with faculty experts commenting on key social issues that resulted in 31 placements in U.S. and Canadian news outlets, including HuffPost, The Chronicle of Higher Education, WBEZ's "Reset," and WTTW's "Chicago Tonight."
- Designed team structure and supervised two staff members and 10 contractors, interns, and vendors who implemented tactics that achieved University goals.

Senior Marketing and Media Manager

2013-2018

Ounce of Prevention Fund (now Start Early) | Chicago, IL

National organization that works to ensure that all children—particularly those born into poverty—have quality early childhood experiences in the crucial first five years of life.

- Conceptualized and implemented strategic marketing communications plan to raise awareness of network of 22 Educare early childhood schools serving 3,400 children and families in 14 states. Managed Educare marketing project budgets up to \$140,000.
- Created a new Educare brand identity using stakeholder interviews and market research to engage target audiences more effectively. Redesigned website and print materials.
- Designed marketing strategy, informed by market research, that successfully enrolled 250+ early childhood educators in pilot of new professional development program in 8 cities.
- Developed content marketing plan that increased engagement with current and new supporters: 14% increase in website traffic, 20% increase in social media interactions, and 40% e-newsletter open rate. Produced 10 videos to educate and build loyalty among target audiences.
- Supervised one associate and multiple freelancers who executed marketing communications tactics.

Communications and Media Manager

2008-2013

Ounce of Prevention Fund (now Start Early) | Chicago, IL

- Created and implemented strategic social media plan that reached new target audiences: increased Facebook fans by 69%, Twitter followers by 99%, and social media referrals to the website by 109%.
- Overhauled email campaigns by studying analytics and developing new content strategy. Resulted in 30% higher email subscription rates and 4% higher open rates for email messages.
- Created marketing, advertising, and corporate sponsorship materials for the organization's premier fundraising event, which raised \$900,000 annually.
- Directed long-term strategic media relations plan that broadened awareness of the Ounce and resulted in stories in outlets such as the Today show, The Atlantic, This American Life, The Huffington Post, and Education Week.
- Spearheaded public relations campaign to raise opposition to proposed "doomsday" budget cuts to Illinois early childhood programs. Campaign results: 69 newspaper, radio, and TV stories; 11,000 calls and emails from advocates to lawmakers that helped convince them to reverse the cuts.

Public Affairs Associate

2006-2008

Chapin Hall at the University of Chicago | Chicago, IL

Communications Manager

2003-2006

Donors Forum of Chicago (now Forefront) | Chicago, IL

Associate Editor

2000-2003

StartSpot Mediaworks, Inc. | Evanston, IL

Education

B.S., Journalism, Northwestern University, 2000

Integrated Marketing Certificate, University of Chicago Graham School, 2008

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Jeff Rice

Email: Jeff.Rice@ElevateNP.org**Phone:** 651-728-3118**LinkedIn:** <https://www.linkedin.com/in/jeffr1ce>

Biography

Jeff Rice is a Construction Manager at Elevate, a nonprofit organization that designs and implements programs that bring clean and affordable heat, power, and water to homes and communities. In this role, Jeff facilitates the implementation of Elevate's various construction projects throughout Wisconsin. He works directly with contractors, suppliers, and clients to ensure that projects are accomplished on time and on budget.

Prior to joining Elevate, Jeff spent most of his career as a general contractor with his family's construction business, specializing in modern, energy-efficient homes. Jeff spends most of his free time outdoors with his family.

Professional Experience

Construction Manager - Wisconsin

2023 - 2025

Elevate, Chicago, IL

- Facilitates the implementation of various solar, HVAC, and weatherization projects across Wisconsin.
- Works directly with engineers to turn their assessments into actionable projects.
- Coordinates with contractors and clients to execute construction projects.

Solar Project Manager

2022 - 2023

Northwind Solar, Amherst, WI

- Routinely managed 40+ solar/storage projects simultaneously
- Improved project management team productivity by 4x
- Designed, produced, and implemented multiple key technology tools to increase the project team efficiency.

Interim Executive Director

2022

CREATE Portage County, Stevens Point, WI

- Led team of 4 staff + dozens of volunteers to implement community art installations and business projects.
- Managed \$600k of state and federal grants to ensure compliance and increase potential for future funding.
- Managed \$2M large-scale commercial development project to create new housing, office, training, and event space.

Director of Business Operations

2017 - 2023

Origin Homebuilders, Custer, WI

- Increased revenue from \$175k to \$2.8M (gross) in 2 years
- Designed 20+ full-scale building and development projects based on client usage needs and desires
- Negotiated and collaborated with municipalities, lenders, suppliers, and clients to perform projects on time and on budget
- Oversaw a large-scale 20-lot development through all phases of project coordination to revitalize an underutilized and underdeveloped neighborhood lot
- Administered all business finances, including altering corporate structure

Adjunct Instructor – Business Dept

2018 - 2020

Mid-State Technical College, Stevens Point, WI

- Taught business planning, marketing, and project management courses
- Constructed syllabi and curriculum to align with student/workforce needs
- Worked with outside partners to incorporate community needs into classroom

Director of Marketing

2015 - 2017

Origin Homebuilders, Amherst, WI

- Developed and carried out all marketing for NWI across numerous channels
- Actively managed customer relationships and member recruitment
- Coordinated and executed off-site multi-day conference as part of a team
- Worked with outside education partners to attract and engage youth as members and volunteers

Marketing Manager

2007 - 2014

Skyward, Inc., Stevens Point, WI

- Built new digital media marketing platform to engage a variety of potential customers, which reached #1 Google ranking for desired keywords
- Managed a team of 8 professionals, including programmers, writers, graphic designers, and sales staff
- Traveled extensively to meet with stakeholders and incorporate their needs into Skyward software
- Conducted trainings for adult learners to increase their school effectiveness and cost efficiency

Education

M.B.A., Marketing Emphasis, Concordia University- WI, Mequon, WI, 2017

B.A., Communication – Mass Media, University of Wisconsin – Stevens Point, Stevens Point, WI, 2005

Certifications

Project Management Professional (PMP), Project Management Institute, 2024

Nora Bonifas

Email: Nora.Bonifas@ElevateNP.org

Phone: 773.828.0382

Professional Experience

Manager, Program Support

2022 – present

Associate, Program Support

Elevate, Chicago, IL

- Educate and build relationships with current and potential customers to maintain high levels of satisfaction and retention
- Maintain and support community programs including smart grid education and associated technologies, energy efficiency and benchmarking, healthy homes, and dynamic pricing
- Utilize performance-based metrics and contribute to feedback loop with program managers on improvements to materials, program design, and processes
- Build out processing for Program Support and the Multifamily Energy Savings Program, including training for future PSAs and detailing new technology integrations while balancing an increasing customer base

Operations Team, Private Coach, Belay Staff

2021– present

Brooklyn Boulders, Chicago, IL

- Educate Coached and organized for BKB Summer Adventures camp, including collaboration with local teachers on STEM (science, technology, engineering, math) breakout activities
- Developed training plans through experiential education in climbing technique with emphasis on personal risk mitigation
- Prioritized hospitality while projecting a positive, constructive attitude and maintained general facility presentation to enhance membership sales offerings

Web Store Manager & Sales Associate

2020 – 2021

Village Cycle Center, Chicago, IL

- Facilitated \$1.4 million in online bike sales alone during an unprecedented increase in store traffic for the largest bike shop in the United States
- Kept correspondence with clientele as they inquired about pre-orders, informing them of updates to over 2,600 backorders and tracking them live
- Optimized outdated scheduling system by coordinating with Mechanics and Sales departments to ensure customer satisfaction and best practice product management

Web Developer & Database Administrator

2019 – 2020

Exicure, Skokie, IL

- Developed a private website and backend data management system for Exicure's DNA research projects
- Provided technical solutions for website growth and fluidity of use in upper management within Exicure

Manager

2019

5411 Empanadas, Chicago IL

- Created, implemented and managed systems including coordinating daily restaurant operations such as inventory and catering preparation in addition to constant vigilance of local, state, and federal laws for legal compliance across all facets of the restaurants

- Monitored customer data to make actionable decisions based on daily traffic and demographics
- Lead employee recruitment, training, development and management of performance evaluations & relations for the building of a personable, professional hospitality team that is consistently supported

Manager, Supervisor, Trainer, Caller

2015 – 2019

Loyola University Chicago, Chicago, IL

- Tracked and analyzed caller statistics, creating programs in CampusCall, SmartCall, and excel to provide feedback to employees
- Contacted alumni to promote continued engagement raising more than \$500,000 for student advancement
- Interviewed, hired, and trained over 300 callers and staff members over 3 years

Education

Bachelors of Science in Physics & Computer Science, Minor in Mathematics, Loyola University Chicago, 2019