

# MaineHousing

## Request for Information (RFI) for MaineHousing LIHEAP Management Information Systems Software

### INTRODUCTION

#### **LIHEAP Program Management Information System Software**

The Low Income Home Energy Assistance Program (commonly called LIHEAP or HEAP Fuel Assistance) provides money to low income homeowners and renters to help pay heating costs. The Fuel Assistance program is administered by nine (9) Community Action Agencies. MaineHousing issues benefit payments, in most cases directly to the fuel vendors.

MaineHousing requires a single system that can be utilized by all of the Community Action Agencies for application and client intake, calculation of benefits, and reporting. Maine Housing requires additional functionality such as vendor management, benefit payments, waiver processing, auditing tools, reporting functionality and program management.

**Request for Information for LIHEAP Management Information System  
Software**

**Table of Contents**

	<b>Page</b>
<b>A. General Introduction .....</b>	<b>1</b>
<b>B. Schedule .....</b>	<b>1</b>
<b>C. Definitions .....</b>	<b>2</b>
<b>D. Purpose.....</b>	<b>3</b>
<b>E. Functionality.....</b>	<b>3</b>
Core Product Functionality .....	3
User Experience .....	3
Data .....	4
Customization .....	4
<b>F. Technical Qualifications.....</b>	<b>4</b>
Core Functions .....	4
Reporting .....	4
Security .....	4

## A. General Introduction

MaineHousing is seeking information from organizations or individuals interested in providing a web-based application that is a comprehensive LIHEAP program system solution. This RFI is not intended to be the final set of requirements on which a contract will be awarded but instead a preliminary step in our process of developing a formal Request for Proposal.

### Inquiries Regarding RFI

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## B. Schedule

RFI is issued by MaineHousing	July 11, 2017
RFI Question and Answer period	July 11 – August 8, 2017
RFI submission due	August 14, 2017
Tentative Date for Oral Interviews / demonstrations	October 16 – 20, 2017

Submissions can come in any format the vendor chooses as long as it is professional and addresses all of the components of this RFI. A written description of how the vendor addresses each element listed in Sections E. and F. below is preferred. It is expected that the submission will include more than the standard marketing materials available through a general online search. We will use all materials submitted to determine if an oral interview and/or demonstration is warranted.

Oral interviews and/or demonstrations will be conducted with respondents that meet all minimum requirements outlined in this RFI. These may be conducted on-site or remotely. Vendors should utilize a “live” database and not a PowerPoint Presentation. The demonstration should include execution of a variety of tasks such as user roles/assess, data entry/updates of client level information, basic navigation, and generation of reports, and benefit payments.

**Dates and times subject to change**

### C. Definitions

MH	MaineHousing
CAA	Community Action Agency –a community action agency selected by MaineHousing to administer the LIHEAP
CSV	Comma-separated values, a file format used to store tabular data (numbers and text) in plain text and for data exchange between incompatible programs
GUI	Graphical User Interface
Household	Any individual or group of individuals who are living together on the date of application as one economic unit for whom residential energy is customarily purchased in common or who make undesignated payments for energy in the form of rent
LIHEAP	Low Income Home Energy Assistance Program
PII	Personally Identifiable Information
User	An individual who will utilize the system as a client, agent representing the client, administrator or vendor

## D. Purpose

The purpose of this RFI is to assist MaineHousing in evaluating alternatives to the current LIHEAP system. The current software has been in place for over ten years, and is in need of updates to enhance its functionality, to increase efficiencies and effectiveness, and to comply with current federal requirements.

MaineHousing will consider the following guiding principles in the decision making process for the selection, purchase and implementation of hardware, software and training along with MaineHousing's strategic goals, risk assessment and budget.

## E. Functionality

### Core Product Functionality

1. Ability for client or agent to complete a LIHEAP application online.
2. Provide application processing and reporting functionality for all users including but not limited to MH and nine state-wide CAAs.
3. Cloning of applications to allow for streamlined processing of returning clients in subsequent program years.
4. Issue client and vendor correspondence regarding the applications and benefit payments.
5. Processing of vendor and client payments, benefit returns and purchase orders.
6. Pre-delivery and post-delivery payment processing.
7. Allow LIHEAP application information to be locked once certification has been established with restricted change privileges only allowed with MH Authorization.
8. Ability to flag applications requiring MH intervention (ex. fraud).
9. Robust reporting system (both internal and external) for LIHEAP program performance, CAA metrics, Federal, State and local reporting requirements.
10. Dynamic functionality that will allow MH to manage federal and state guidelines including but not limited to defined data points used to calculate benefits based on household income, home energy consumption, and demographics.
11. Software must include basic customization tools to allow MH System Administrators the ability to update maintenance tables such as towns, landlords and employers, and business rules to correspond with program rules.
12. Management of vendor contracts and pricing.
13. Collection of entire household consumption data to use in benefit calculations and reporting
14. CAA administration with functionality for invoicing administration and program costs.

### User Experience

1. Intuitive and efficient workflow that maximizes the usability of the system for a diverse population of users.
2. Guided workflow that identifies and prompts user to complete applicable forms based on program rules and specific client information.
3. Ability to upload and view specific client documents that are tied to the client household and application.
4. Ability to view benefit calculations.
5. Intuitive search functionality for client and vendor information.
6. Ad hoc querying and reporting functionality.
7. Accessible in any major web browser.
8. Robust: system is live for use at least 99.99% of time.

## Data

1. All data is owned by MH, and system will provide on-demand real-time export of all system data.
2. Open and flexible platform which maximizes opportunities for data integration across multiple software solutions through syncing live data and sharing data through import and export of data.

## Customization

1. Vendor must have the ability to provide complex customization at a fair hourly rate.

## F. Technical Qualifications

### Core Functions

1. Web-based system.
2. All user interfaces are clean, modern and easy to use. System is consistent in user interface and functionality: buttons, terms, functions, and placement, and movement, transitions all look and work the same from any point of entry.
3. System supports data completeness and data quality through automated systems, reports, business rules and other processes.
4. System minimizes data duplication and data incongruence.
5. Allow multiple, customized user roles for many levels of system users.
6. Allow for over 500 users to be concurrently logged into system.
7. Full audit system that includes multi-level tracking for system users and administration. Tracking to include data changes as well as user activity.
8. System enables storage of attachments to application and vendor records.
9. Payment processing with accounting system.
10. EFT capabilities.
11. System supports reliable, easy-to-use processes for data sharing and integration with other systems.
12. Customer support team is consistently available, responsive, and reliable.

### Reporting

1. Solution includes a reporting tool that is integrated, immediate, extensive, supported, configurable, easy-to-use, and unlimited by size or frequency of query.
2. Reports are easy-to-use and accessible by CAAs and MH.
3. Reports can be saved in multiple formats such as CSV, PDF, and TXT etc.
4. Availability of a separate reporting server updated daily to prevent disruptions to production processing.
5. Robust auditing and compliance monitoring functionality.

### Security

1. Native web-based access with no requirements for additional sub systems; for example: Silverlight, Java, Flash, etc.
2. PII must be encrypted during transit, in use and at rest.
3. Two factor Authentication strongly advised.
4. Solution includes Single Sign On capability.
5. System provides masking of SSN in GUI.

## **MAINEHOUSING NONDISCRIMINATION NOTICE:**

*MaineHousing does not discriminate on the basis of race, color, religion, sex, sexual orientation, gender identity or expression, national origin, ancestry, physical or mental disability, age, familial status or receipt of public assistance in the admission or access to or treatment in its programs and activities. In employment, MaineHousing does not discriminate on the basis of race, color, religion, sex, sexual orientation, gender identity or expression, national origin, ancestry, age, physical or mental disability or genetic information. MaineHousing will provide appropriate communication auxiliary aids and services upon sufficient notice. MaineHousing will also provide this document in alternative formats upon sufficient notice. MaineHousing has designated the following person responsible for coordinating compliance with applicable federal and state nondiscrimination requirements and addressing grievances: Louise Patenaude, Maine State Housing Authority, 353 Water Street, Augusta, Maine 04330-4633, Telephone Number 1-800-452-4668 (voice in state only), (207) 626-4600 (voice) or Maine Relay 711.*