



Request for Proposals for Energy Assistance and Weatherization Software

SCHEDULE

Issued: Monday, September 14, 2026

Deadline for Questions: Wednesday, September 30, 2026, at 5:00 p.m. EST

**Deadline for Submitting Proposals: Friday, October 16, 2026
at 5:00 p.m. EST**

**MaineHousing Contact for this Request for Proposals:
Charles Smith, Business Systems Manager (Project Manager)
E-mail: EHSRFP@mainehousing.org**

Maine State Housing Authority (“MaineHousing”) does not discriminate on the basis of protected classes under the applicable federal and state nondiscrimination laws, in the admission or access to, or treatment in, its programs and activities and in employment. 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: Kelley Stonebraker, Maine State Housing Authority, 26 Edison Drive, Augusta, Maine 04330, Telephone Number 1-800-452-4668 (voice in state only), (207) 626-4600 (voice), Maine Relay 711, or Email EqualAccess@mainehousing.org.

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Request for Proposals for Energy Assistance and Weatherization Software

I. INTRODUCTION

Overview

In this **Request for Proposals for Energy Assistance and Weatherization Software** (the “RFP”), Maine State Housing Authority ("MaineHousing") is requesting proposals from experienced, qualified, and professional companies (“Vendor”) who can provide and assist with the implementation of a comprehensive, modern, and secure Energy Assistance & Weatherization software solution.

Functionality included in the scope of this RFP includes but is not limited to; functions for client intake, energy audits, work orders, Subgrantee and State inspections, contractor invoicing, payments from multiple funding sources, budgeting, billing, and report generation.

To meet the requirements for the weatherization functionality, the software audit tool must be able to receive approval by the U.S. Department of Energy (DOE) for use in the State of Maine, comply with applicable laws and regulations, including the WAP regulation set forth by DOE at 10 CFR Part 440 and be able to perform calculations for energy savings by using an energy audit tool comparable with the National Energy Audit Tool (NEAT) and the Manufactured Home Energy Audit (MHEA) Weatherization Assistant software from Oak Ridge National Laboratory. Pursuant to DOE requirements, the energy audit tool in the System must be able to receive approval from DOE for use in the State of Maine.

About MaineHousing

MaineHousing’s mission is to empower staff and partners in helping Maine people afford safe, high-quality housing as a foundation for healthy communities. MaineHousing is a quasi-independent state entity that, at its core, couples the efficiencies of the private financial markets with public purpose goals to provide affordable home ownership and rental housing opportunities for Maine people. In addition, it administers a number of federal housing-related programs including, but not limited to, the Low-Income Housing Tax Credit Program, the Section 8 Rental Assistance programs, and the Emergency Solutions Grant Program, on behalf of the State of Maine. These federal programs, as well as others, reduce costs associated with housing for Maine people.

MaineHousing is also responsible for the State of Maine Home Energy Assistance Program (“HEAP”) and DOE’s Weatherization Assistance Program (“WAP”). HEAP is made up of several components including the Central Heating Improvement Program (“CHIP”), the Emergency Crisis Intervention Program (“ECIP”), the Energy Self Sufficiency Program (“ESS”), and the HEAP Weatherization Program (“HEAP Wx”). In prior years HEAP also included a Heat Pump Program, which could potentially return in future years. MaineHousing’s Energy and Housing Services (“EHS”) Department along with nine Community

Action Agency (CAA) partners throughout the state and ProsperityME utilize the current software solutions to manage each of the above-mentioned programs.

A new software solution would need to have the ability to manage both HEAP and WAP programs, and the potential to manage additional programs administered by MaineHousing such as the Lead Program and the Home Accessibility and Repair Program (“HARP”). For more information about these programs and MaineHousing please go to www.mainehousing.org.

II. GENERAL TERMS AND CONDITIONS

Review and Compliance

It is the responsibility of each Vendor to review this entire document, including its attachments, and comply with all requirements of this RFP. "Vendor" refers to any person or entity who may, or does, submit a proposal in response to this RFP.

Questions and Answers

All Vendor questions deemed relevant and material to this RFP along with the response answers will be posted by MaineHousing at <https://www.mainehousing.org/about/rfp>, no later than Friday, October 9, 2026.

Any responses or answers provided by MaineHousing to Vendor questions will automatically become a part of this RFP.

Proposal Terms

All proposals submitted by Vendors and received by MaineHousing will be treated as contract offers. A Vendor’s proposal must remain open from the time of receipt of the proposal by MaineHousing and continue for a minimum of 90 days after the conclusion of the Vendors product demonstration period, pursuant to this RFP and may not be unilaterally modified by Vendor during that period.

Alterations, modifications, or variations of a proposal after the submission deadline will not be considered by MaineHousing, unless authorized by an amendment or addendum to this RFP issued by MaineHousing.

In the case of any award pursuant to this RFP, the awarded Vendor must keep in effect all proposal terms, including pricing, throughout any contract negotiations.

Proposal Costs

MaineHousing is not liable for any expenses incurred by the Vendor in the preparation, delivery, or presentation of their proposals, or in connection with any product demonstrations.

Costs of developing and delivering proposals and demonstrations pursuant to this RFP are solely at the expense of the Vendor.

Proposal Materials

All proposals submitted, including all items and materials submitted as part of the proposals, become the property of MaineHousing, whether or not selected. Proposal materials may be appended by MaineHousing to any contract between MaineHousing and the Vendor providing such materials.

Contract Term

The initial term of the contract awarded, pursuant to this RFP, will be for a period of two (2) years and extendable up to a maximum of five (5) years from the date the contract is executed between the Vendor and MaineHousing. MaineHousing reserves the sole right and option to extend the contract in incremental terms of one (1) year each which, including the initial contract term, will not exceed a total of five (5) years.

III. REQUIREMENTS

General Requirements/Scope of Work

At a minimum, MaineHousing's expectation is to select a Vendor to provide the breadth of functionality necessary to support the business processes to successfully deliver HEAP & WAP benefit payments and services, and meet all state and federal reporting requirements. The system must meet the following requirements:

- HEAP and WAP functionality is integrated into the same software solution.
- Online portal supports mobile-friendly application process.
- Ability to have more than one subgrantee provider per territory covering multiple programs each.
- Ability to complete energy audits in the field regardless of internet access.
- Household centered.
- Supports MaineHousing's compliance with all applicable federal program requirements for the programs it administers, including all applicable federal reporting, eligibility, record retention, and data requirements, and must be updated as those requirements change.
- Agency-scoped data and user roles so each CAA/subgrantee manages only its own caseload, with statewide read and reporting access for MaineHousing EHS across all agencies.
- Cross-agency duplicate detection so a household is not served in error by more than one agency.
- Potential to accommodate additional smaller programs (the Lead Program, HARP, etc.) within the same unified system.

Proposals must demonstrate the Vendor's understanding of MaineHousing's needs and expectations as prescribed in this RFP and must demonstrate the Vendor's capability to meet those needs and requirements.

Specific Requirements

Proposals must describe specific features of Vendor's software and how the software meets each of the detailed functional requirements listed in Appendix E. Vendors must complete the Appendix E requirements as a compliance matrix, responding to each numbered requirement with one of: Comply (available out of the box), Configure (available through configuration by MaineHousing staff), Customize (requires custom development), or Cannot. Narrative may be added but a response for every requirement is mandatory.

Security Requirements

The Vendor must describe how the software solution will maintain the highest level of security protection of all sensitive, protected, and/or confidential data and materials throughout the contracted relationship.

At a minimum, the software solution must:

- Require multi-factor authentication (MFA) for all users
 - Acceptable methods: Microsoft Authenticator, or other modern phishing-resistant authentication methods
 - Unacceptable methods: SMS, Voice call, Email
- Support Azure single sign-on and role-based access.
- Enforce password complexity controls, including required length, rotation frequency, and validation feedback.
- Vendor must disclose any artificial intelligence (AI), machine learning (ML), generative AI, large language model (LLM), or automated decision-making functionality in the proposed solution. This disclosure must explain the purpose of each feature and state whether MaineHousing data is processed by or used to support it. Vendor may not use, transmit, disclose, or train any AI or ML model with MaineHousing data through a third-party AI or ML service unless MaineHousing provides prior written authorization (see Section VII, Restrictions on Use of MaineHousing Data).
- Capture audit trail of all database activity and produce reports of audited activity.
- Utilize currently supported encryption methods for data at rest and in transit. (At least AES-256 at rest, TLS 1.2+ in transit).
- Undergo independent third-party penetration testing at least annually and remediate identified vulnerabilities on a defined, risk-based schedule. The Vendor will provide a summary or attestation of results along with evidence of remediation.
- Notify MaineHousing of all actual or suspected security incidents or data breaches within 24-hours.
- Provide a current SOC 2 Type II report (or equivalent independent assessment) on request, and disclose all sub-processors, subcontractors, and hosting providers with access to MaineHousing data.
- Protect applicant and household personally identifiable information in compliance with LIHEAP confidentiality requirements and applicable state data-privacy law.

Any Vendor that is invited to the demonstration phase of the selection process will be required to complete the MaineHousing Vendor Security Survey prior to the software demonstration. If you would like a copy of the MaineHousing Vendor Security Survey, please make that request via email to EHSRFP@mainehousing.org. The findings of the security survey may disqualify the vendor from moving forward in the selection process.

Implementation and Change Management

The following requirements cover the implementation of the software solution once the contract has been awarded.

Project Management

- The Vendor must assign a dedicated project manager to serve as the primary point of contact throughout the implementation.
- The project manager will be responsible for managing all aspects of project delivery and ensuring milestones are met on schedule.
- The project manager will identify and attempt to remedy any potential risks or project roadblocks before they impact the project timeline.

Project Timeline and Milestones

- The Vendor must provide a detailed project timeline with estimated completion dates for key milestones, including development, configuration, data migration, testing, training, and go-live.
- The timeline must include adequate time to fully test the developed system prior to the go-live date.
- The implementation must be completed and ready for production use before 07/01/2027.

Design and Approval

- The Vendor must collaborate with MaineHousing to understand and map existing business processes through workshops, meetings, and documentation review.
- Features to be developed or configured to meet MaineHousing's needs must be presented as mock-ups, wireframes, or prototypes and approved by MaineHousing before development begins.

Acceptance

- The Vendor and MaineHousing will establish objective, written acceptance criteria for each milestone and deliverable.
- MaineHousing will have a 15-day review period to test each deliverable against its acceptance criteria.
- MaineHousing will document acceptance criteria approval or denial.
- If a deliverable fails to meet the acceptance criteria, the vendor will have an opportunity to remedy any deficiencies. MaineHousing will then re-evaluate against the acceptance criteria.
- A milestone or deliverable is not considered accepted, and is not payable, until it has passed acceptance testing.

Change Order Process

Vendors must adhere to the following change order process for any modifications to the project scope, deliverables, timelines, costs, or other contractual terms once the contract is effective:

- Any changes to the project must be requested in a written Change Request that includes a detailed description of the proposed change, the reason for the change, and the date of the request.

- Once a Change Request has been submitted, the Vendor must conduct an impact assessment and provide MaineHousing with a written Change Order Proposal analyzing how the proposed change will impact on the project's scope, timeline, cost, resources, and risk.
- MaineHousing will review the Change Order Proposal and may request additional information or clarification and will approve or deny the proposal in writing.
- Approved Change Order Proposals will be formalized in a written Change Order signed by authorized representatives of both parties.
- No work on the proposed change may be performed until MaineHousing has approved the change in writing.
- Once the Change Order is finalized, the Vendor is responsible for updating all relevant project documentation, including the project plan, schedule, budget, and deliverables affected by the change.
- Any work performed outside the scope of the original contract or an approved Change Order that has been executed by both parties will be considered unauthorized, and MaineHousing is not obligated to pay for unauthorized work.

IV. PROPOSAL PRICING

Cost Items

The Vendor must provide:

- Detailed, **itemized, and firm pricing** for all costs associated with this RFP.
- Include all necessary labor, hardware, software, configuration and programming and the selection of the proper type and quantities of the system components to assure a complete and operational solution.
- A fee schedule for one time or monthly recurring costs, including any extra costs necessary to support software upgrades, incident response, scalability of services or off hours access or services.
- A five-year total cost of ownership summary

The basis of the price and any underlying assumptions must be included in the Vendor's cost proposal.

Payment

Generally, payment by MaineHousing will be tied to specific milestones, which may include satisfactory acceptance testing, and/or deliverables.

Payment terms are net 30 days after receipt of correct invoice containing information required by MaineHousing and acceptance of deliverable (after testing).

V. PROPOSAL SUBMISSION REQUIREMENTS

This section of the RFP deals with the requirements for the contents and submission of proposals.

Demonstration of Qualifications

Submit the following:

- a. Qualifications and Experience
 - i. List of qualifications and experience

- b. Equal employment opportunity and affirmative action policy
- c. Insurance
- d. Copies of both Certificate of General Liability Insurance and Certificate of Workers Compensation Insurance
- e. Certificate of Data Breach Liability Insurance and Professional Liability (E&O) Insurance.
- f. Commitment to provide services in the best interest of MaineHousing.
- g. Certificate of Good Standing from the applicable State of Incorporation (if not Maine) as well as a certificate from the Maine Secretary of State if the entity is doing business in Maine. This is not applicable to individuals.

Business References

Vendors must provide a minimum of three (3) business references from clients who have one of the Vendor's a software solution in production for at least two years. If the Vendor currently has the Vendor's proposed software solution in production, please provide at least two of the three business references from those clients that have had the solution in production for at least two years. MaineHousing reserves the right to contact and verify any or all references provided.

Using the following table format, Vendors must provide up-to-date, accurate, and complete contact information for each of the three (3) business references:

RFP: MaineHousing RFP for Energy Assistance and Weatherization Software	
Business Name:	
Business Reference Contact Information	
Name:	
Street Address:	
City, State, Zip:	
Phone, including area code:	
Email address:	
Alternate Contact Information	
Name:	
Street Address:	
City, State, Zip:	
Phone, including area code:	
Email address:	
Project Information	

Brief description of vendor's software modules being used in production for this reference.	
How long have you worked with this vendor?	
Has this vendor supported you with an incident response? If so, describe summary of incident and resolution.	
What federal or state housing programs are tracked using this vendor's software solution?	

Deadlines & Delivery

It is the responsibility of each Vendor to ensure a timely submission of their proposal to MaineHousing at EHSRFP@mainehousing.org . See Appendix D for all proposal deadlines.

All proposals **must be submitted by e-mail in PDF format**.
MaineHousing is not responsible for late delivery of a proposal for any reason.

Late proposals **will not be accepted or considered**.

Hard copy, facsimile, or telephone proposals **will not be accepted or considered**.

When submitting your proposal to EHSRFP@mainehousing.org, the email subject line must state:

"RESPONSE TO ENERGY ASSISTANCE AND WEATHERIZATION SOFTWARE RFP"

Organization/Formatting

Proposals must be presented following the prescribed instructions within this RFP. The proposal, along with all supplemental documentation required under this RFP, must be:

Submitted in electronic .PDF format.

Pages numbered consecutively

Provided in the sequential order listed below:

1. Vendor Information Sheet (see Appendix A),
2. Vendor Proposal Response – include Detailed Requirements from Appendix E,
3. Itemized Costs and Licensing Model,
4. Business References (see table under Section V for formatting),
5. Service Level Agreement,
6. Company W-9,
7. Current Certificate of General Liability Insurance,
8. Current Certificate of Workers Compensation Insurance,

9. Current Certificate of Data Breach Liability Insurance,
10. Current Certificate of Professional liability (E&O) insurance,
11. Equal employment opportunity and affirmative action policy,
12. Vendor Certification Form (see Appendix B),
13. References for existing or previous system users, as requested,
14. MaineHousing Conflict of Interest Disclosure Form (see Appendix C).

Content

All information requested by this RFP must be submitted as part of Vendor's proposal. **Only information that is received in response to this RFP will be evaluated.**

References to information submitted to MaineHousing outside this RFP process or references to Internet website addresses will be deemed non-responsive and will not be considered by MaineHousing.

Cross-references to other portions of a Vendor's proposal submitted in response to this RFP are acceptable but must reference the specific section number and heading for identification.

All proposals must include completed and signed Vendor Information Sheet (Appendix A) included in this RFP. The Vendor Information Sheet must be placed at the front of the proposal.

All proposals must include a completed and signed Vendor Certification form attached to this RFP under Appendix B.

RFP Point of Contact/Submission

To ensure clear communications, the following individual has been designated the point contact for this RFP. All requests, questions, proposal documents, and/or correspondence must be communicated through this designated RFP contact:

Name:	Charles Smith
Title:	Business Systems Manager (Project Manager)
Address:	MaineHousing, 26 Edison Drive, Augusta, ME 04330
Email:	EHSRFP@mainehousing.org

Vendor contact with any MaineHousing employee, consultant, or other MaineHousing representative concerning this RFP other than the MaineHousing contact person given above will be grounds for proposal rejection.

Questions

All questions must be in writing and submitted only to the designated RFP contact email address previously given. Attempting to ask questions in person, or by telephone will not be allowed and can disqualify a Vendor.

Vendors will only rely on written statements issued from MaineHousing's designated RFP point of contact.

VI. PROPOSAL EVALUATION

An evaluation committee consisting of MaineHousing staff will review all proposals. The evaluation committee may also include external partners. The evaluation committee may contact the Vendor to clarify any response and obtain information from any available source concerning any aspect of the proposal. MaineHousing may request any Vendor present to the evaluation committee as part of the selection process.

Vendor is cautioned that the evaluation committee is not required to ask for clarifications or information that is essential for a complete and thorough evaluation of Vendor proposals. Therefore, all proposals should be complete when submitted.

MaineHousing intends to select the proposal or proposals that provide the best value in meeting MaineHousing's business objectives identified in this RFP. MaineHousing will also take into account the detail and completeness of proposals.

Subject to the reservation of rights and the other terms and conditions of this RFP, MaineHousing will select the Vendor or Vendors whose proposal is most advantageous to MaineHousing. Any award is contingent on successful negotiation of the final contract terms. In no event will any claimed obligations of any kind be enforceable against MaineHousing unless and until MaineHousing and the selected Vendor enter into a written contract. This RFP and any successful Vendor's proposal, as may be modified pursuant to this RFP will be incorporated by reference into and be part of any contract between MaineHousing and the Vendor, MaineHousing will determine a detailed work plan with any selected Vendor prior to initiating product and/or services to help maximize efficiency for the Vendor and MaineHousing.

Scoring Criteria

RFP award scores will be based on both technical and financial evaluations through a comprehensive review and analysis by the Evaluation Committee.

Evaluation Scoring	Points
Qualifications and experience of entity / persons assigned, including History of Past Performance.	15
Ability of proposed services to meet requirements outlined in RFP	30
Potential to provide software solutions for smaller MaineHousing programs	5
Completeness of proposal; all required documentation submitted.	15
Implementation Methodology/Work Plan and Timeline	15
Proposal Pricing - Costs covered under this proposal are exempt from all Federal and State Taxes. Prices must be clear, accountable, and auditable, covering the full spectrum of services required. Costs and compensation must be consistent with current market rates.	20
Maximum Award Points:	100

VII. TERMS AND CONDITIONS

Rights Reserved by MaineHousing

In addition to the rights reserved by MaineHousing elsewhere in this RFP, MaineHousing reserves the right to:

- Adjust the timetable for this RFP as deemed necessary, including but not limited to extending proposal deadlines.
- Waive informalities and minor irregularities in proposals received.
- Reject and not consider any or all Vendors who do not meet the requirements of this RFP, including but not limited to incomplete responses and/or non-responsive proposals.
- Reject any or all proposals received and not to award a contract pursuant to this RFP, or to cancel or terminate this RFP process at any time, whether before or after any proposals have been submitted or received, if deemed by MaineHousing to be in its best interest.
- Negotiate price or other factors included in any proposal submitted to MaineHousing, and in the event MaineHousing is unable to negotiate a mutually satisfactory contract with the successful Vendor under this RFP, MaineHousing may, in its sole discretion, negotiate with another Vendor or cancel this RFP and not award a contract to any Vendor.
- Reject the Vendor selected pursuant to this RFP and to offer a contract to another Vendor in the event the selected Vendor does not enter into the required contract to provide related services described in this RFP.
- Negotiate directly with one Vendor if the responses to this RFP demonstrate a lack of competition.
- Correct or amend this RFP. In no case will this RFP be amended within seven (7) days of the proposal submission deadline unless the amendment includes an extension of time or is for the purpose of extending deadlines. MaineHousing will not be liable for any costs incurred as a result of changes to this RFP.

Other Terms and Conditions

Conflict of Interest. The Vendor, any principal or affiliate of the Vendor, or anyone who will be paid for work on the Contract, that has business ties, familial relations, or other close personal relations with a current MaineHousing employee or a commissioner, or anyone who was a MaineHousing employee or a commissioner within the past year must disclose this information under **Appendix C - Conflict of Interest Disclosure Form**.

Vendor Certification Form. As a mandatory requirement of this proposal, all Vendors must complete and submit the Vendor Certification Form attached to this RFP as **Appendix B**, along with their proposal submission.

Confidentiality and Nondisclosure. Vendor shall maintain in trust and confidence and shall not disclose to any third party, except as such disclosure may be authorized in writing in advance by MaineHousing, and shall not use for any unauthorized purpose, any and all information, documents and data received or obtained from or on behalf of MaineHousing. Vendor may use such information, documents, and data only to the extent required for the purposes described in this RFP. Vendor shall adhere to all security, confidentiality, and nondisclosure policies and procedures required by MaineHousing for the protection of such information and data from unauthorized use and disclosure

and from loss.

Restrictions on Use of MaineHousing Data. The Vendor shall use MaineHousing data solely to perform its obligations under the contract and for no other purpose. Without limiting the Confidentiality and Nondisclosure provisions above, the Vendor agrees that:

The Vendor shall not sell, share, transfer, or otherwise make MaineHousing data available to any third party, except to sub-processors or subcontractors who are necessary to perform the contract, who have been disclosed to and approved by MaineHousing, and who are bound in writing to data-protection terms at least as restrictive as these.

The Vendor shall not use MaineHousing data for its own or any third party's benefit, including product development, analytics, benchmarking, research, marketing, or resale.

The Vendor shall not input, transmit, or disclose MaineHousing data to any third-party artificial intelligence, machine learning, or large language model service, and shall not use MaineHousing data to train, fine-tune, develop, improve, test, or evaluate any artificial intelligence or machine learning model, whether the Vendor's own or a third party's, except as expressly authorized in writing by MaineHousing. Any artificial intelligence or machine learning functionality offered within the software must operate only on MaineHousing data within the contracted system environment, must not transmit MaineHousing data outside that environment, and must not use MaineHousing data to train or improve models made available to other customers, unless MaineHousing expressly authorizes it in writing. These restrictions survive expiration or termination of the contract.

Maine Freedom of Access Act. Information submitted by a Vendor in any proposal becomes public information and is subject to disclosure in accordance with the requirements of law, including without limitation the Maine Freedom of Access Act, 1 M.R.S.A. Section 401 et seq. ("FOAA"), except as provided therein. Vendor acknowledges that MaineHousing is required to comply with FOAA.

Protest Procedures. Protests of any award made pursuant to this RFP must be submitted in writing to MaineHousing at the address given on the cover page of this RFP, to the attention of: Director. To be considered, protests must be received by MaineHousing within fifteen (15) calendar days from the date of notification of the contract award and provide specific reasons and any supporting documentation for the protest.

Women and Minority Owned Businesses. Women and minority owned businesses are encouraged to apply. To subcontract any of the work, Vendor must follow the steps outlined in 2 CFR 200.321.

Office of Management and Budget (OMB) Compliance:

- Compliance with 2 CFR 200.331 - To subcontract any of the work, Vendor must follow the steps outlined in 2 CFR 200.331 for subrecipient and contractor determinations.
- Compliance with 2 CFR 200, Subpart F (200.501) – audit requirements of a non-federal entity that expends \$1,000,000 or more in federal award funds in their fiscal year.

APPENDIX A
VENDOR INFORMATION SHEET

for
MaineHousing Request for Proposals for Energy Assistance & Weatherization
Software

Please provide the following information, completed and signed, and place this form at the front of the proposal:

General Information	
Company Name:	
Federal Tax ID:	
Street Address:	
City, State, Zip:	
Telephone#:	
Contact Person for Questions	
Name:	
Title:	
E-mail Address:	
Telephone#:	
Business Description	
# Years in Business:	

# Years providing Energy Assistance & Weatherization software of similar scale and composition as described in this RFP:	
Current Company Size:	
Current # Workers and Current # of Customers:	
Evidence of Workforce expertise, experience, qualifications, and knowledge	<i>Please be sure to include all supplemental qualification documents.</i>
Summarized Narrative of Vendor's ability to provide the services, materials, and labor required under this RFP:	
Summarized Narrative of Vendor's ability to provide a software solution for smaller MaineHousing programs like the Lead Program and HARP:	
List of planned resources to be assigned to meet the obligations of this RFP:	

APPENDIX B
VENDOR CERTIFICATION FORM

for
MaineHousing Request for Proposals for Energy Assistance & Weatherization
Software

Vendor Name	
Vendor Address	

The undersigned Vendor represents and certifies as follows:

1. The prices in this proposal have been arrived at independently and without consultation, communication, agreement, or disclosure with or to any other Vendor or potential Vendor.
2. No attempt has been made at any time to induce any firm or person to submit any intentionally high or noncompetitive proposal or to otherwise submit or refrain from submitting a proposal for the purpose of restricting competition.
3. Vendor has not given, and will not give at any time hereafter, any economic opportunity, future employment, gift, loan, gratuity, special discount, trip, favor, or service to any employee or representative of MaineHousing in connection with this RFP.
4. Vendor acknowledges that MaineHousing will determine whether a conflict of interest exists and that MaineHousing reserves the right to disqualify any Vendor on the grounds of actual or apparent conflict of interest.
5. Vendor has not employed or retained any person or entity to solicit or obtain any contract resulting from this RFP and has not paid or agreed to pay to any person or entity any commission, percentage, brokerage, or other fee contingent upon or resulting from the award of any such contract.
6. Vendor understands and acknowledges that the representations in its proposal are material and important and will be relied on by MaineHousing in evaluating the proposal. Vendor certifies that, to the best of its knowledge, all of the information contained in its proposal is true, correct, and complete and acknowledges that any intentional misrepresentation by Vendor will disqualify Vendor from further consideration in connection with this RFP.
7. The undersigned individual is legally authorized to sign this Vendor Certification Form for and on behalf of Vendor and to bind Vendor to the statements made herein.

Name, Title and Signature of Individual with Authority to Bind Vendor	
Name	
Title	
Signature	
Date	

APPENDIX C
CONFLICT OF INTEREST POLICY – MAINEHOUSING PARTNERS *
for
MaineHousing Request for Proposals for
Energy Assistance and Weatherization Programs

To maintain the continued confidence of Maine citizens in carrying out our joint mission to assist Maine people in obtaining and maintaining quality affordable housing, MaineHousing Partners must avoid situations which are, or appear to be, at odds with their responsibilities to MaineHousing. Maine law and federal regulations (when federal funding is involved) govern conflicts of interest.

MaineHousing Partners must ensure that **no** person who is an employee, agent, or consultant of the Partner – *and* who performs any functions with respect to any MaineHousing program – may obtain a personal or financial interest or benefit (other than their earnings) from MaineHousing programs, either for themselves or for those with whom they have family, business, or close personal ties. As soon as the Partner becomes aware of a potential conflict of interest:

- The Partner must disclose to MaineHousing all personal and business relationships between Partner’s employees and any contractors, agents, or consultants who work on MaineHousing programs.
- The Partner must disclose to MaineHousing all employees (including temporary employees and volunteers) of the Partner who are applicants for MaineHousing programs administered by the Partner.
- The Partner must disclose to MaineHousing anyone who will be paid for work on MaineHousing programs who is a current or former MaineHousing employee or commissioner – or has family, business, or close personal ties with a current or former MaineHousing employee or commissioner (within the last year.)

Conflict of Interest Definitions

A ***conflict of interest*** arises when the personal interest of an employee (or a family member, friend, or business associate of the employee) conflicts or potentially conflicts with the employee’s work duties or responsibilities to MaineHousing. Conflicts of interest can occur when actions may be improperly influenced by a secondary motive, such as:

- financial gain,
- professional advancement, or
- desire to do favors for family and friends.

* This policy applies to all individuals and organizations who receive funding from or who have a business or contractual relationship with MaineHousing. Pertinent partners include, but are not limited to: Grantees, Subgrantees, Sub-recipients, Community Action Agencies, Shelters, Developers, Applicants, Contractors, Administrators, and Vendors.

An ***appearance of a conflict of interest*** exists if circumstances are believed to create a risk that decisions may be improperly influenced by other motives. It is important to note that a conflict of interest may exist, regardless of whether any unethical or improper act has taken place.

A ***direct interest*** occurs when the employee individually, or through a majority stakeholder position in an entity, owns or is a party to any contract, business agreement, project, or property. Individuals with management, control or other decision-making responsibilities, or voting rights for an entity, are also considered to have a direct interest.

An ***indirect interest*** occurs when family members, friends, or business associates of the employee have ownership or contractual rights in any contract, business agreement, project, or property. Shares in an entity by the employee or commissioner through an investment vehicle, a trust or estate arrangement, mutual fund, or other intermediary also meets the definition of an indirect ownership interest. Additionally, any ownership interest in a related entity (such as a parent company or subcontractor) that plans to do business with MaineHousing is considered an indirect interest.

Family members are defined broadly, and include spouse/partner, mother, father, son, daughter, mother-in-law, father-in-law, son-in-law, daughter-in-law, brother, sister, brother-in-law, sister-in-law, nephew, niece, uncle, aunt, first cousin, grandparent, grandchild. Family members also include all "half" or "step" relatives (e.g., half-brother or stepdaughter).

Conflict of Interest Procedures

Personal or Business Relationships Involving Employees

As soon as a Partner becomes aware of a personal or business relationship involving an employee that could give rise to perceived partiality, an appearance of a conflict of interest, or an actual conflict of interest in connection with MaineHousing programs, **the Partner shall disclose the relationship to MaineHousing in writing, with a description of the Partner's plan to manage the potential conflict.** Once reviewed and approved by MaineHousing's Internal Auditor, the plan must be signed by the employee and representative(s) of the Partner and submitted to MaineHousing. Plans must be reviewed and re-signed once a year.

Employees as Applicants for MaineHousing Programs

If eligible, Partner employees (including temporary staff and volunteers) are encouraged to apply for MaineHousing programs administered by the Partner. However, in advance of a benefit being paid, approval of any program application by a partner employee **requires two levels of signature**, including the Director or other Senior Executive of the Partner.

Copies of signed applications must be submitted to MaineHousing and maintained by the Program Department in accordance with required Records Retention periods. The Partner must also retain original signed and approved applications in accordance with required Records Retention periods.

Compliance with the Partner Conflict of Interest Policy and Procedures will be monitored by MaineHousing staff and subject to periodic program audits.

If you are unsure whether a situation constitutes a conflict of interest, please consult with your contact at MaineHousing, or email MaineHousing's Internal Auditor, Kimberly Whitley, at kwhitley@mainehousing.org.

APPENDIX C
MAINEHOUSING PARTNERS
CONFLICT OF INTEREST DISCLOSURE FORM

I have read and understand the *Conflict of Interest Policy – MaineHousing Partners*.

☐ YES

☐ NO

Do you (or any of your principals or affiliates, or anyone who will be paid for work in connection with the project, program, contract or services at hand), have business ties, family relationships, or other close personal relationships with a current MaineHousing commissioner or employee or anyone who was a MaineHousing commissioner or employee within the past year?

☐ NO

☐ YES (please describe below, or attach)

Signed: _____

Date: _____

Printed Name: _____

Title: _____

APPENDIX D

KEY PROPOSAL DATES

for

MaineHousing Request for Proposals for Energy Assistance & Weatherization Software

All dates are subject to change at MaineHousing's discretion.

All proposal documents, correspondence, and/or questions must be emailed to: EHSRFP@mainehousing.org

RFP Issuance:	
Date Issued:	<u>Monday, September 14, 2026</u>
Questions & Answers:	
Questions:	Questions will be received: From: Monday, September 14, 2026, to Wednesday, September 30, 2026, <u>no later than 5 p.m. EST.</u> Questions must be emailed directly to: EHSRFP@mainehousing.org
Answers:	All questions, and their subsequent answers, will be posted on the MaineHousing website for public viewing. Questions will be answered no later than Friday, October 9, 2026 <i>To locate these postings, go to the MaineHousing website located at:</i> https://www.mainehousing.org/about/rfp
Pertinent Proposal Dates:	
Deadline for Proposal Submission:	<u>Friday, October 16, 2026, no later than 5:00 p.m. EST</u> <i>**Please be sure emailed proposal is in PDF format, as well as all supplemental documentation.</i>
Proposal Evaluation Review and Demonstration Phase:	From: <u>Monday, October 19, 2026, to Friday, October 30, 2026</u>
Contract Offering:	<u>Friday, November 13, 2026</u>

APPENDIX E

DETAILED FUNCTIONAL REQUIREMENTS for Energy Assistance & Weatherization Software (HEAP & WAP)

Application Intake

1. Applicant Portal for applicants to complete their application, submit required documentation and see the updated status of their application as it is being processed.
 - a. Portal will integrate application data with the existing system data real time; it is expected that there will be a final data transfer from the current software to the new system at launch or shortly thereafter.
 - b. Portal is designed to be intuitive for the applicant, with the purpose of each page clearly stated and instructions included where appropriate.
2. Ability for both the applicant and the CAA to download and print the HEAP application.
3. Applicant is able to indicate interest in other services agency offers; applicant can apply for WAP without applying for HEAP.
4. CAA able to enter application for new and returning applicants directly into the system.
5. CAA/Applicant able to communicate via the portal and automated notifications based on application status. Please confirm that two-way communications are able to take place within the portal vs having to email outside of the portal and that the application status changes will trigger automated communications to the applicant.
6. Household centered focus for application which provides access to historical data.
7. Application (portal and base system) supports contextual responses to streamline data entry and required documents:
 - a. The Intake process should be intuitive to identify what documents should be completed by the applicant and provide those documents at the time of intake (i.e., Permission to Share, Minor Child Primary Residence).
 - b. Supports categorical eligibility, meaning income documentation is not required when applicant provides documentation of receipt of other applicable income-based programming. Categorical eligibility functionality is available when application is submitted using the portal or base application.
 - c. Weatherization documents can be uploaded and saved with a specific property (address) or job.
8. Document management in the base system will support record retention requirements.
9. Applicant can E-sign application and other forms needed to complete the application via the “Portal”.
10. Ability to track fraud and flag applicants in cases where fraud is detected, fraud status will remain intact from year to year.
11. Portal would have option for applicant to select their native/preferred language (French, Spanish, etc.) to inform CAA staff. The system will not need to be translated into other languages.
12. System will not allow duplicate, eligible applications for the household within the same program year for any application across the State.
13. Ability to merge duplicate households, consolidating applications and uploaded files into a single household record.
14. Duplicate SSN to be flagged in the system for a given program year (PY).
15. System captures current, timestamped, fuel status needed to prioritize emergency crisis energy assistance and for reporting purposes. The household may not be in an emergency situation when initial intake is done, but the status will need to be updated if they request ECIP, so the timestamp is important.
16. When new applications are created from previous years, validate and flag all data elements against current status. (i.e., inactive vendors would be flagged so intake worker would be aware that new vendor needs to be selected). Any data validation discrepancies that may occur should be flagged.

17. Data validation edits will be flexible and support clear messaging to applicant. Flexible data validation edits means that MaineHousing can modify the rules/edits, and the error message will reflect the intent of the edit. An example: Utility account number validation must be a defined format, if not error message would trigger in the portal, and in the base system before proceeding to the next field. It is estimated there will be at least three (3) different types of applications to be configured; Annual Energy Assistance, Emergency Assistance, and Weatherization which each have differing eligibility and documentation requirements.
18. System will use an address verification solution to ensure accurate information.
19. Advanced search features, for example application search can be initiated for any member of the household.
20. Ability to assign workflow notifications for person(s) next in line to process the application.
21. Ability to enter/read case notes for households. Ability to see historical case notes, preferably a running case note record per household. Ability to manually archive or flag case notes for importance.
22. Ability to have more than one subgrantee provider per territory covering multiple programs each. (i.e., CAA A covering Cumberland County for HEAP Fuel Assistance, ECIP, and ESS but CAA B covering Cumberland County for CHIP/HEAP Wx and DOE WAP) regardless of grant funding source.

Certification/Eligibility Determination

1. Rules should be easily manipulated by MaineHousing staff and would not require vendor resources to change rules. All rules should be 'effective' dated. Rules are used to determine eligibility, benefit determination, and data validation. As an example, an applicant with a negative heating burden qualifies for a \$21 benefit.
2. Application date is used to determine program year and program rules and effective dated master files (i.e., Poverty Rate, Benefit Matrix,) that apply.
3. Applicant demographics are used to prioritize processing sequence. This requirement is for both Heating Assistance (HEAP) as well as Weatherization (WAP). The system needs to be able filter/prioritize serving households that have a member 60 years of age or older, 6 years of age or younger, or with a disability.
4. Ability to manage multiple funding sources w/associated rules including eligibility criteria during each program year.
5. Multiple heating source types.
6. Generate various letters and benefit notifications pulling data from the system, and the ability to customize letters without vendor support. All letters generated by the system should be customizable. For example: Annual changes to instructions to the client within letters are typically changed. Letters should contain 'tags' to pull variable data from the database for specific applicant details. Notifications are received by both vendors and clients. Depending on the notification, communication could be emailed or mailed through USPS.
7. System tracks application statuses which reflect natural workflow, and a process map is available to demonstrate the workflow.
8. System supports denial reversals, and voided applications.
9. Ability to track informal review/fair hearing information in the system. Identify informal review/fair hearing requests, information, comments, and associated documents.
10. Ability to access and track history of notifications and letters previously sent.
11. System has the ability to track contact attempts with applicants.

Vendor Management

1. Vendor Portal for vendors to submit contracts, vendor invoices, e-sign, and receive payment remittance advices.
2. Ability to manage vendors including but not limited to the ability to add new vendors, activate, and inactivate vendors.
3. Vendor Changes and user access to PII should be tracked in an audit record.
4. Have the ability to override payments with inactive vendors without having to reactivate the vendor.

5. The ability to do batch vendor changes on applications. (i.e., For example, when an existing vendor is purchased or has a name change, ability to change all current year applications to new vendor, however previous year applications would still reflect original vendor name).
6. Ability for vendors to submit WAP and HEAP Wx bids, and if approved have those charges applied to the appropriate measures. The bid pricing is specific to each vendor, per measure, per agency.
7. Ability to have more than one contact for vendors including the contact type (Address: remittance, mailing, physical, and Email: primary, notices, benefit returns, etc.)

Payment Processing – Energy Assistance Only

1. Vendor and applicant payments will need to accommodate both prepay and post payment processes. For prepay, the system generates Vendor Voucher Reports that are sent to Vendors and the report includes: Primary Applicant Name, physical address, phone number, benefit amount, home energy type, account information, and payment/check memo that displays the allocation name and program year. For post payment, Vendors receive a credit notification report and MaineHousing makes payments after deliveries are made then Vendors submit related required document. The ability to add service date to record the delivery and agency approval dates for post payment.
2. Either integrated payment generation (check printing and NACHA file export/reconciliation) or API to external payment generation system.
3. Returned or Multiple payments are tracked and re-issued from the software. Such as a prepayment benefit that is not used, multiple ECIP payments to one household above the fuel assistance, Benefit returns, etc.
4. Ability to generate and manage multiple purchase orders or credit notifications, including but not limited to the ECIP benefit. A household may receive multiple ECIP benefits above the original HEAP benefit.
5. Ability to manually adjust the benefit return deposit date.
6. Ability to manage overpayments and fraud in the system.
7. Ability to place payment hold on applicant or vendor.
8. Ability to manually adjust payment amount. MaineHousing should be allowed with restricted access by MaineHousing staff to edit benefit amounts in rare circumstances. If the amount is changed to less than the system-determined benefit amount, the system should produce a warning message.
9. Flag for inactive vendors in the payment process but ability to pay, if needed.
10. When a vendor is no longer doing business with MaineHousing, but payments are still due, MaineHousing would want to allow the payment to go through without allowing new applications.

Payment Processing – Weatherization Only

1. Ability to have more than one CAA covering a territory (i.e., a territory may have one CAA for HEAP but a completely separate and distinct CAA for Weatherization)
2. System will generate invoice from CAAs to MaineHousing for reimbursement of weatherization efforts. Invoices will be based on completed/inspected jobs for the month.
3. Ability to split billing between HEAP Weatherization and DOE Weatherization (needs to have the ability to bill between multiple funding sources including leverage funds).
4. Ability for CAAs to select the jobs to be included on the invoice to MaineHousing. There are times that the jobs might have met the milestones to be billed but are not invoiced to MaineHousing in the current month invoicing for different reasons.
5. Ability for negative billings in the case of a change order to reduce cost, or an overpayment.
6. Invoice workflow to manage technical, compliance, and fiscal file review status by job. Invoices are approved for payment by the fiscal team after the technical and program file review of the jobs. Payments are made by MaineHousing to the CAAs outside of the system, however payment status should be tracked within the system.

7. Ability to reconcile technical & file review w/ invoices submitted by CAA and track status by job.
8. Ability to alert MaineHousing when an invoice has been submitted/resubmitted or alert the CAA user when an invoice has been rejected.
9. Ability to track CAA budgets in the system, running balance will be adjusted as invoices are processed.

Energy Modeling – Weatherization Only

1. Software meets all DOE software certification requirements. Certification is documented and maintained throughout the contract. MaineHousing may be open to using a DOE authorized third party energy modeling tool (such as Weatherization Assistant by Oak Ridge Labs) with results being integrated into the proposed solution for the management of the program.
2. DOE energy audit modeling can be completed for single family, multifamily and manufactured home properties.
3. Document results of energy audit inspection using mobile device regardless of internet accessibility. For those locations without internet connectivity, mobile device data can be synchronized with base system when internet access is achieved. Mobile device software works on Apple iOS. Both the energy audit and the quality control inspection should have the ability for mobile data entry during the audit without internet then synchronizing the information to the system when the internet is next accessed.

Job Management – Weatherization Only

1. The wait list of applications are ranked by points associated with different DOE criteria (income, energy use, elderly/disabled/children). The ranking points are a product of the initial referral/application processing. The priority rank is used to determine the sequence of energy audits.
2. Ability to identify custom criteria (i.e., Length of time on the waitlist) to affect the ranking points.
3. Ability to manage program waitlist.
4. Energy audit results and selected measures are used to generate work orders.
5. Capture deferral items (comply with DOE allowed deferral reasons). System will generate deferral letters to applicant. System generated deferral reports will meet DOE reporting data requirements.
6. Ability to assign work orders directly to a vendor or multiple vendors for a particular job. An itemized labor and materials list for each vendor should be able to be stored in the system to be used when a bid is submitted and the work order is created for a specific vendor.
7. The ability to see where the jobs are in process/what the status is. (i.e., Audited, Work Ordered, Inspected, etc.)
8. CAA Quality Control Inspection documents pass/fail status and any rework assignments if applicable.
9. MaineHousing can identify which jobs will need Quality Control Assurance (QCA) inspection. Ability to enter QCA pass/fail data into system and any rework assignments if applicable.
 - a) Scanned paper documents and pictures will need to be uploaded into the system; pictures will need to have file meta data / geocoding captured and able to be reviewed. These documents and pictures will need to be attached and referenced in the client file.

Data Migration

1. Weatherization historical data will need to be migrated from legacy systems (SQL DBs) to track applicants served and services provided in previous years. The systems currently do not communicate with one another. MaineHousing pulled minimal information into an excel spreadsheet for a CAA reference resource. Each system contains historical information that did not migrate over when MaineHousing moved to the current software. Each system was provided by different vendors and there is no consistent data structure. The legacy data for weatherization is used to meet DOE requirements for a 15-year lookback. The legacy data will need to minimally include Agency name, client name, address, job cost, and funding source.

2. Energy assistance historical data would need to be migrated from multiple sources, Excel, and legacy SQL databases. Sufficient data must be migrated to support benefit returns from previous years. This legacy data for Energy Assistance provides for Benefit Returns to be received outside the current program year. Benefit Returns are frequently received for years beyond the current year. Additionally, legacy data for energy assistance is used to create new applications from the prior year. The legacy data will need to minimally include Agency name, client name, address, household members, and fuel type.
3. Vendor should include data migration pathways to ensure migrated data from the previous program year is in sync with new system. There will be no ongoing data exchange between the new system and the legacy systems.

Reporting

1. Standard reports are delivered with the software and can be scheduled or run ad hoc dependent on user security roles:
 - a. List standard reports – federal requirements, board of directors or internal needs.
 - b. Vendor will provide report updates to federal reporting requirements to meet federal guidelines and timelines.
2. Ad hoc report writer tool can be used by end users without technical skills to meet various reporting requests (i.e., Percentage of all weatherization jobs that had QCA, deferral reporting). Reports can be generated by program year as well as by date range. This requirement refers to the functionality built inside the software program.
3. Users can filter and export data from the system on demand, in real time, to common formats (e.g., CSV, Excel), subject to role-based access.
4. Ability to transmit data to EmpowOR CADS for CSBG Reporting purposes. APIs that support additional vendors are welcome but not required.
5. Dashboard type visual reports not limited to but consisting of households served by geography, county, funding source, demographics, agencies, application status.
6. Dashboard will reflect user data access level (i.e., If agency staff are accessing dashboard, they would only be able to see their applications reflected in the dashboard data) The account and role-based access should determine what can be viewed in the dashboard.
7. Software allows customer staff to easily generate dashboards or detailed reports based on changing requirements.
8. Support for data APIs to generate a local reporting database. Some mechanism ETL for localized data warehouse to use a 3rd party tool.
9. Ability to report on vendor and partner performance and compliance.
10. Ability for Weatherization programs to track number of units completed / paid and to track ACPU (PUA) per unit average cost per DOE guidelines.

Technology

1. Unified database solution for all programs supported by the software application. This ensures one source of truth; data entered in one “module” front end is immediately available in another.
2. System fully supports monitoring access and logs changes to sensitive data. Audit reports provide visibility to the log data. All data log changes to be easily viewable. Ability to filter on type of change made.
3. Legacy system data will be converted into new system database for all applicants and vendors. Vendor will assess legacy data conversion needs and provide options to meet business requirements. Tools are available to support conversion of legacy data into the new system. We expect the vendor to include data migration from legacy systems as part of the full implementation of the system.
4. System supports Azure single sign on
5. Vendor utilizes a ticketing system with customer access to track support requests. Service level for ticket response is clearly defined and escalation procedure is available to customer.

6. Document size limits are published and file types restricted. Files are scanned for malware or other attack vectors before being uploaded and stored in the system. Any file upload process should include modern malware detection and current definition files by the vendors file storage system(s).
7. Role based security is available and custom roles can be defined by MaineHousing. Sensitive data access is controlled by role level security within the application and reporting tools.
8. System upgrade and patching process is clearly defined along with vendor/customer roles and responsibilities.
9. Production, Training and Test environments are licensed to customer. Due to the fact that the test environment may undergo changes to production level processes, a separate training environment is necessary to maintain consistency with the current production system.
10. Vendor provided documentation would include user guide, administrator guide, data dictionary, and database entity relationship diagram.
11. Vendor must make timely DOE required updates to software.
12. Solution supports use in Microsoft Edge, Mozilla Firefox, and Google Chrome browsers.
13. If solution is vendor hosted, all servers are located in the United States.
14. Vendor can provide results from web application security testing.
15. Mobile support for the applicant portal.
16. Mobile support for the base application that includes offline access. This will be for Energy Audit and QCI inspections only.
17. Vendor disaster recovery plan is provided.
18. Vendor solution is high availability and high redundancy.
19. Message board on logon screen has time bound messaging capability. This should be able to provide banner announcements on login.
20. The Vendor discloses any artificial intelligence or machine-learning features in the proposed solution, describes what data those features process and where that processing occurs, and confirms whether any customer data is used to train or improve models.
21. All data remains the property of MaineHousing and is provided on request, and on contract termination.

Extensibility to Additional Programs (Desirable)

1. The system can be configured by MaineHousing staff to intake, determine eligibility for, pay, and report on additional smaller programs without a separate procurement.
2. New programs and funding sources can be added using the same effective-dated rules engine, document management, vendor/payment, and reporting components used for HEAP and WAP.
3. Vendor describes the effort, cost model, and any limitations for adding a new small program, and whether MaineHousing can do so independently or requires vendor services.
4. Households and vendors are shared across all programs so a single household record spans HEAP, WAP, and any additional programs.
5. Vendor must be available to provide system training to the partner Community Action Agencies.

Additional information:

1. The budget will be defined by the scope and functionality of the selected software solution. The proposed solution must be inclusive of all requirements.
2. The complete DOE required steps to receive certification can be viewed at www.energy.gov.
3. DOE approval must be in place before launch.
4. MaineHousing conservatively estimates the following will potentially access the system: 30 internal MaineHousing Staff, 200 contracted/CAA staff, 300 vendors, and upwards of 20,000+ applicants for the portal.
5. MaineHousing receives, on average, 65,000+ applications per year.
6. The legacy data migration is a one-time expectation.
7. Minimum of 40 Energy Auditors (both MaineHousing and CAA staff) will complete energy audits.

8. It is anticipated that when the system is launched, both energy assistance (HEAP, and Weatherization (WAP), will be receiving intake at the same time.
9. The expected format of generated invoices for CAA to MH reimbursement for the WAP efforts will be .csv to be imported into the fiscal software.
10. CAA partners use the same software systems as MaineHousing for Energy and Weatherization; at the launch of the new software the current systems will no longer be used for ongoing operations.
11. The vendor management section applies to both energy assistance and weatherization.
12. For Weatherization, each CAA is expected to be able to manager their own Vendors.
13. Key milestone, both HEAP energy assistance and Weatherization must be live by July 1, 2027.
14. Respondents should identify any offshore resources to potentially be used. Such resources may be acceptable as long as all code and data systems are validated for security and integrity and data never leaves the US.
15. Key personnel do not need to be onsite for meetings.
16. MaineHousing will allow for both in-person and virtual demonstrations if a vendor is invited.
17. MaineHousing does not have a preference on the solutions electronic signature tool.
18. The state does not have recommendations on the address service provider to perform mailing address verification.
19. Fraud is defined and identified outside the system but tracked in the system.
20. There will need to be a vendor onboarding process in the system.
21. There will need to be a user onboarding process in the system with options that MaineHousing can then identify and configure role type/usage.
22. Tracking of Informal reviews / Fair Hearing of the appropriate information manually but not managing the process.
23. There will be scanned documents that will need to be uploaded into the system for the Energy Assistance and Weatherization programs including pictures that will need to capture meta data / geocoding. These scanned documents will need to be attached and referenced in the client file for future review.
24. Energy Assistance collectively refers to the Fuel Assistance and Emergency Crisis Intervention programs.
25. Weatherization collectively refers to the DOE Weatherization (WAP/T&TA/Readiness), HEAP Weatherization, Heat Pump, and CHIP Programs.