



Request for Information on Software Systems and Services for the Management of

- **Low-Income Home Energy Assistance Program (LIHEAP)**
- **Low-Income Weatherization Assistance Program (WAP), and possibly**
- **the New Hampshire Electric Assistance Program (EAP)**

by the

New Hampshire Office of Energy & Planning

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1 REQUEST FOR INFORMATION

1.1 SUMMARY

The New Hampshire Office of Energy and Planning (OEP) requests information that will inform our decisions about the acquisition of software systems and/or services to help us manage and deliver, in coordination with five Community Action Agencies (CAAs), the federally funded Low Income Home Energy Assistance Program (LIHEAP), the federally funded Weatherization Assistance Program (WAP), and possibly the ratepayer funded Electric Assistance Program (EAP). We request information about existing solutions that can manage any or all of these programs.

We also request information about how these new systems might be integrated with legacy systems and Community Action Agency programs that share clients and data with LIHEAP, WAP, and EAP. We also request information about how systems could be deployed in each of a variety of ownership models and management structures.

We anticipate using the responses we receive from this request to inform the development of a request for proposals (RFP) for the acquisition of software or software services in 2016. We welcome responses from organizations that provide software and services for programs like WAP and LIHEAP, as well as from participants in New Hampshire's WAP, LIHEAP, and EAP programs who wish to provide these services.

1.2 THE ORGANIZATIONS

*The NH Office of Energy and Planning*¹ is the state agency that receives funding from the US Department of Health and Human Services' to administer the LIHEAP program in the state. OEP contracts with each of New Hampshire's five Community Action Agencies to deliver the program statewide. The NH LIHEAP program (also referred to as the NH Fuel Assistance Program or FAP) is funded through a block grant and serves approximately 35,000 households per year. Information about the program is available at <http://www.nh.gov/oepp/energy/programs/fuel-assistance/index.htm>.

OEP also administers the US Department of Energy's WAP program, serving approximately 200 householders per year. As with LIHEAP, the state's CAAs deliver the program under contracts with OEP. Information about the NH WAP can be found at <http://www.nh.gov/oepp/energy/programs/weatherization/index.htm>.

Each CAA is an independent non-profit organization with decades of experience and a range of program responsibilities that extend far beyond WAP and LIHEAP, the programs that they deliver for OEP.

¹ <http://www.nh.gov/oepp/>.

One of those responsibilities is the delivery of the Electric Assistance Program (EAP) which shares many attributes with LIHEAP (e.g., similar eligibility requirements) but which is under the jurisdiction of the *NH Public Utilities Commission*.² An *EAP Advisory Board* that includes OEP, the utilities, the CAAs, the Office of the Consumer Advocate, the NH Association of Welfare Directors, and NH Legal Assistance plays an advisory role to assist the PUC with the oversight of EAP. As they do with WAP and LIHEAP, the CAAs deliver the Electric Assistance Program in cooperation with the electric utilities. Unlike the federally funded programs, EAP is funded through a portion of the system benefits charge paid by all electric customers³ in New Hampshire. More information about EAP can be found at <http://www.puc.nh.gov/Consumer/electricassistanceprogram.htm>.

The Electric Assistance Program reduces electricity bills for eligible low-income utility customers. In recent years it has served approximately 35,000 households annually. The program currently has five discount “tiers” ranging from 9% to 77%; the level of discount depends on a variety of factors including income and family size.

EAP utilizes the same software system as LIHEAP, as the intake process is the same for both programs. (Clients can also indicate their interest in participating in WAP during intake, though there is a long waiting list for that program). Intake for the EAP program occurs at the CAA level and one can apply for EAP at the same time one applies for LIHEAP and/or WAP. The existing software is designed to determine EAP eligibility and calculate the correct discount level for each EAP applicant. The utilities’ billing systems draw this information (client name, utility account number, and discount tier) from the EAP system and report back data on the client’s electric usage and costs. Any new software that serves the EAP will need to perform these functions and interface with the electric utilities.

1.3 LEGACY SOFTWARE SYSTEMS

The Belknap-Merrimack Community Action Agency has had lead responsibility, on behalf of the NH Association of Community Action Agencies, for managing the development and maintenance of a database program that handles LIHEAP and EAP clients for each of the CAAs, and for OEP and the PUC. That system cannot currently provide the enhanced analytics that US DHHS is requiring for LIHEAP in the next program year. In addition, OEP has read-only access to the system and finds it difficult to develop reports and to conduct analysis of the program with the current system.

One of the CAAs has been beta-testing an alternative client management software service, “EmpowOR,” in order to provide a modern, integrated platform for its programs, including LIHEAP and EAP, and to communicate with both the state and federal Health and Human Services agencies. Although not fully developed or deployed, the EmpowOR system has acquired some of the status of a legacy system.

² <http://www.puc.nh.gov/Electric/electricassistanceprogram.htm>. The funding for EAP is generated by a portion of the system benefits charge on electric bills.

³ The state’s four small municipal electric utilities do not participate. Those systems are in Littleton, Ashland, Wolfeboro, and Woodsville.

There is not currently an integrated software system in place to manage WAP statewide. Instead, each CAA manages its WAP data on its own spreadsheets. Intake and eligibility processes are shared with LIHEAP but the two programs are otherwise tracked separately. New Hampshire's Weatherization Assistance Program uses TREAT for its audits and to calculate savings-to-investment ratios for weatherization measures.

1.4 ALTERNATIVES UNDER CONSIDERATION

OEP seeks a technology solution that will maximize benefits across all of the institutions that have a role in managing these programs. (The institutions seek improved access by managers to data and analysis; ease of use; low cost; enhanced coordination across programs; enhanced data security; training and tech support.) Because we do not yet know what solutions are available and how they are best managed, we present this list of alternatives defining various possible approaches to the technology and its ownership or governance.

1. **Status Quo with Improvements:** OEP may require that the CAAs' current systems meet the new federal data requirements required for LIHEAP, and increase functionality to improve user experience and increase reporting and analysis opportunities.
2. **Limited Solution:** OEP could issue an RFP to modernize the management of WAP and LIHEAP, providing OEP with either primary or shared management of the system.
3. **Comprehensive Solution:** OEP could issue an RFP to modernize the management of WAP, LIHEAP, and EAP if the PUC agrees, providing OEP with either primary or shared management of the system.
4. **Comprehensive Client Management tools:** OEP could issue an RFP to seek comprehensive integrated tools for OEP, the PUC, the CAAs and possibly other agencies to use for the management of CAA programs including but not limited to WAP, LIHEAP, and possibly EAP. Although OEP's administrative responsibilities extend only to the federally-funded energy programs, we could seek a system that would have broader utility to the CAAs.
5. **Incorporate some or all legacy systems:** An RFP could request vendors to propose a solution which might, for example, integrate with one or more CAAs' client management systems, and/or the extant LIHEAP/EAP system.
6. **Governance structures:** OEP requires a direct role in the management of the new system in order to fulfill its management and oversight responsibilities for the federal programs, and will expect complete access to the LIHEAP and WAP program data in a new or upgraded system. OEP values collaborative relationships and would consider a variety of ownership/management structures for the system and its data, as long as they are consistent with its obligations as a federal grantee.

1.5 REQUEST FOR INFORMATION FROM VENDORS, POTENTIAL BIDDERS, AND OTHERS WITH RELEVANT EXPERIENCE

- A. Please provide information that will help us understand the capabilities of software products and services available today that would meet the needs described above. You may describe your own product and services or you may explain how your approach, in tandem with something else on the market, could address our needs. You may also propose an alternative we have not described here.
- B. You may describe a product or approach that is fully developed and ready for implementation, or one that requires substantial customization, or one that could be developed specifically for this purpose. Please specify the product's maturity and readiness for deployment.
- C. Please be specific about whether your product or approach is best suited for replacing all legacy systems or for working with any or all of the existing systems.
- D. Please provide examples of organizations that are currently using your product or approach and explain how the configuration (ownership, management, access) compares to a possible deployment in New Hampshire.
- E. This phase of our process is NOT competitive and will have no bearing on who will be eligible to respond to our eventual Request for Proposals. Any competitive selection process conducted by OEP will not be influenced by whether any particular firm or product participated in this RFI. Any pricing information included in responses will be viewed as illustrative only.
- F. Participants in New Hampshire's current WAP, LIHEAP and EAP programs may also respond with information about the performance and management of the programs' software and systems.

2 AGENCY OVERVIEW

The Office of Energy and Planning (OEP) is part of the Executive Department within the Office of the Governor.

The Office of Energy and Planning is responsible for:

- Managing programs that provide community services such as Fuel Assistance, Weatherization, floodplain management assistance, conservation land stewardship, statewide population data information, and the availability of a statewide computerized geographic information system;
- Promoting energy efficiency and reducing energy costs by supporting programs for residents, state government buildings, businesses and industry, and schools and towns;
- Exploring opportunities to expand the use of renewable, domestic energy resources such as biomass, wind and solar energy;
- Supporting the principles of smart growth at the state, regional, and local levels through municipal and regional planning assistance;
- Supporting programs that focus on protecting and managing the natural resources of the state including floodplains and coastal watersheds; and
- Participating in a number of state boards and committees relating to energy and planning, including the Council on Resources and Development, the Energy Efficiency and Sustainable Energy Board, and the Nuclear Decommissioning Finance Committee.

3 LIKELY SECURITY REQUIREMENTS

The New Hampshire Department of Information Technology has guidelines for data security for programs serving the state. To receive a copy, please send a request by email to Robert.Ditman@nh.gov. The guidelines are likely to shape our final RFP. If you care to comment on their strengths and weaknesses or how they might be modified for this project, please submit those thoughts as well. If you believe that these guidelines would unduly constrain OEP's ability to acquire the kind of software or services we define above, please explain.

4 RESPONDING TO THIS RFI

The Office of Energy and Planning welcomes information from all sources and in almost any written format. We request that responses be concise and focused on the question and issues raised in Section 1 of this document. Generic sales proposals or product descriptions will be less helpful than responses that explain how a product or approach could meet some or all of the needs described in Section 1.

4.1 STRUCTURE OF THE RESPONSE; ADDRESSES

Please respond by email with a PDF attachment or a link to a downloadable PDF. Send emails to: Robert.Ditman@nh.gov.

OEP will accept hard copies mailed to its office, but has a strong preference for electronic submissions. Please note that the state does have inbox size restrictions, and that we will reply to all submissions to confirm receipt.

Mailing address:

Robert Ditman
NH Office of Energy and Planning
107 Pleasant Street, Johnson Hall
Concord NH 03301

4.2 PARTICIPANTS WELCOME

OEP welcomes information from all sources with relevant experience in the field. Potential bidders on a final system RFP are welcome to participate, as are partners in the three programs described here, and members of the general public. All respondents should provide full contact information as well as details about their experience in this field and their role in any relevant organization or service provider.

If you anticipate bidding on a final RFP for services related to this request, please so indicate. OEP will then be certain to include you in the RFP distribution list.

4.3 RFI SCHEDULE

RFI key dates are the following:

March 3, 2016	RFI posted on NH websites and emailed to known vendor list.
March 18, 2016	Deadline for emailing questions about the RFI.
April 1, 2016	OEP will post responses to all questions to its website.
April 15, 2016	Deadline for submitting responses.

4.4 RFI TERMS & CONDITIONS

Please DO NOT respond with any proprietary information or with a specific budget proposal for your service, product, or approach.

This RFI is a request for information about potential products and services and no contractual obligation on behalf of any agency shall arise from the RFI process.

This RFI does not commit OEP to pay any costs incurred in the preparation or submission of any response to the RFI.

OEP will not return any submissions to this RFI.