REQUEST FOR PROPOSALS (RFP)
Program Administration Platform & Website Development

RFP No.: 2026-010

Issue Date: 12-29-2025 - Intent to apply notification by January 5th 2026

Proposal Due Date: 1-30-2026 5pm EST

Issuing Organization

Resource Smart, Inc. ("Resource Smart")

RFP Contact

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Title: Systems Manager

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1. INTRODUCTION

1.1. Resource Smart LLC ("Resource Smart"), in its role as Program Administrator ("PA") for the New Jersey Board of Public Utilities ("NJBPU"), is soliciting proposals from qualified firms ("Offerors" or "Vendors") to design, configure, implement, and support an end-to-end program administration platform, including integration with Resource Smart's existing metrics reporting system, (Application Programing Interface (API's) for secure data transfer to/from customers and development of a public program website.

1.2. The platform will support administration of New Jersey's Home Energy Rebates programs and related offerings, including the Multifamily Retrofit Initiative for Sustainability and Equity (M-RISE) program and CP-HEAR. (More information on the programs can be found on: https://www.njcleanenergy.com/residential/m-rise-program)

1.3. The selected Vendor will provide:

1.3.1. Initial solution design and implementation of a secure, scalable software platform that includes:

1.3.1.1. Integration with required third-party systems, Resource Smart's reporting system, and data reporting interfaces to NJBPU, US Dept. of Energy ("DOE") and its lab: Pacific Northwest National Laboratory (" PNNL").

1.3.1.2. Secure data transfers between clients and us and to NJBPU and DOE that meet DOE requirements, and applicable State of New Jersey requirements.

1.3.1.3. A basic public-facing program website and participant portals.

1.3.2. Three (3) years of ongoing support, maintenance, and enhancement services under a defined Service Level Agreement ("SLA") that may be extended if required.

1.3.3. Business process improvement services starting with documentation of the processes and standard operating procedures ("SOPs") utilized in the design, creation, and operation and maintenance of the platform and website.

2. BACKGROUND

2.1.1. NJBPU has engaged Resource Smart as its Program Administrator for New Jersey's participation in DOE's Home Energy Rebates programs, including but not limited to:

2.1.1.1. Home Efficiency Rebates ("HER")

2.1.1.2. Home Electrification and Appliance Rebates ("HEAR")

2.1.1.3. Coordinated programs (e.g., CP-HEAR)

2.1.1.4. The M-RISE multifamily program

2.1.2. Resource Smart, on behalf of NJBPU, is responsible for:

2.1.2.1. Application intake and eligibility determination.

2.1.2.2. Coordination with contractors, building owners, and tenants/households.

2.1.2.3. Rebate calculation and issuance.

2.1.2.4. Quality assurance/quality control ("QA/QC") and inspections.

2.1.2.5. Consumer protection, complaint handling, and issue resolution.

2.1.2.6. Data management and reporting to DOE, NJBPU, and other stakeholders.

2.1.3. Resource Smart currently uses an internal system to support metrics reporting to customers. It uses Salesforce, Smartsheets, and QuickBooks for program management workflows. The new platform must integrate with its current systems through APIs, webhooks, or other secure integration mechanisms, while also serving as a primary system of record, workflow engine, integration hub, and reporting environment for the NJBPU program.

3. OBJECTIVES

3.1. The primary objectives of this RFP are to:

3.1.1. Implement an end-to-end program administration platform that supports complete lifecycle management of program activities, including application intake, qualification and management of projects and their rebates, QA/QC, complaints, and reporting.

3.1.2. Provide public-facing web and portal functionality, including:

3.1.2.1. A basic, branded program informational website aligned with NJBPU and program branding.

3.1.2.2. Secure portals for property owners/agents, contractors, NJBPU, DOE, households/tenants and other stakeholders.

3.1.3. Implement API-based integration with DOE/PNNL systems, using DOE's rebate reservation structure as the primary data specification, without relying on spreadsheet submissions.

3.1.4. Maximize data automation and real-time visibility, delivering:

3.1.4.1. Automated end-to-end data flows and validations.

3.1.4.2. Real-time or near real-time dashboards for program and compliance metrics.

3.1.5. Three year operation and maintenance and support agreement to ensure reliability, enhancements, and compliance updates over the life of the HER/HEAR and related programs.

4. SCOPE OF WORK

4.1. Overall Solution Approach

4.1.1. The Vendor shall design and deliver a solution that:

4.1.1.1. Is cloud-based, secure, and scalable.

4.1.1.2. Provides a configurable data model for program entities (programs, properties/buildings, units/households, participants, applications/projects, rebates/payments, inspections/QA/QC, complaints, and reports).

4.1.1.3. Includes workflow/process automation, role-based access, portal capabilities, and API integration.

4.1.1.4. Supports real-time or near real-time reporting and dashboards.
4.1.1.5. Can be integrated with existing and future tools (e.g., accounting systems, telephony, energy modeling tools) through APIs and standard protocols.

4.1.2. The Vendor shall propose a specific architecture and technology stack that meets the functional, technical, security, and compliance requirements described in this RFP. No specific commercial or open-source platform is prescribed; the solution must be platform-agnostic and enterprise-grade.

4.2. Functional Requirements

4.2.1. Program & Case Management

4.2.1.1. The solution must provide robust case management for:

4.2.1.1.1. Programs
4.2.1.1.2. Properties/buildings and units/households
4.2.1.1.3. Participants (owners, agents, tenants/households, contractors)
4.2.1.1.4. Applications/projects and associated measures
4.2.1.1.5. Rebates/payments
4.2.1.1.6. Inspections/QA/QC
4.2.1.1.7. Complaints and consumer protection cases

4.2.2. Key Capabilities

4.2.2.1. Configurable workflows for intake, eligibility, technical review, rebate approval, QA/QC, and complaint resolution.
4.2.2.2. Queues, assignments, and SLA timers.
4.2.2.3. Full audit trails of actions and changes.
4.2.2.4. Data model and workflows that support all data elements required by DOE and NJBPU.
4.2.2.5. Online application forms in portals that capture all required program elements with validation.
4.2.2.6. Captured data must be usable for energy savings modeling and API transmission to DOE/PNNL.
4.2.2.7. Clear field mapping between portal fields, internal data entities, API payload fields.

4.2.3. Portals & Web Interfaces

4.2.3.1. The Vendor shall implement:

4.2.3.1.1. A public program website (microsite) on a modern Content Management System (CMS), aligned with NJBPU and DOE branding, providing information about program offerings, eligibility, process steps, and contact information.
4.2.3.1.2. An owner/property manager portal for applications, document upload, status tracking, messaging, and viewing rebate histories.
4.2.3.1.3. A contractor portal for project assignments, documentation, QA/QC responses, scheduling, and communication.
4.2.3.1.4. A household/tenant portal, as applicable, for complaints.
4.2.3.1.5. Public complaint/feedback webforms integrated into the consumer protection and case-management module.

4.2.3.2. All portals and websites must:

4.2.3.2.1. Be responsive and accessible (WCAG 2.1 AA or equivalent).

4.2.3.2.2. Support multi-language content for key pages and forms (using an AI translator tool.

4.2.3.2.3. Be usable on standard mobile browsers without requiring app-store downloads.

4.3. Consumer Protection & Complaint Management

4.3.1. The platform must support:

4.3.1.1. Complaint intake from webforms, email logs, and phone/interaction logs.

4.3.1.2. Configurable complaint case structures capturing key attributes (type, severity, parties, program, property, contractor, timelines, outcomes).

4.3.1.3. SLA-based workflows with timers, reminders, and escalations.

4.3.1.4. Full historical tracking of case activity and outcomes.

4.3.1.5. Reporting on complaint volumes, types, resolution times, and trends

4.3.1.6. Consumer protection workflows should be fully integrated with the core program data model (programs, properties, contractors, households).

4.4. Reporting & Analytics (Real-Time & Automated)

4.4.1. The platform must provide:

4.4.1.1. Near real-time dashboards for program performance (applications, pipeline, completions, savings), contractor performance, QA/QC, complaints, and financial/compliance metrics.

4.4.1.2. Data quality views for DOE Form 50121 fields and other critical data elements, including validation errors and exception queues.

4.4.1.3. Automated data flows from operational modules into reporting structures (no manual export/import chains for routine reporting).

4.4.1.4. Drill-down capability from key performance indicator (KPI) dashboards to underlying records.

4.4.1.5. Export capabilities (e.g., CSV, Excel, PDF) for ad hoc analysis.

4.5. DOE & External Integration – API-Driven, Template-Aligned

4.5.1. The solution must:

4.5.1.1. Implement portal-based forms aligned to DOE Form 50121, capturing all required reservation and completion data elements for applicable programs.

4.5.1.2. Support integration with outputs from various building energy savings modeling tools (e.g., TREAT, EQuest, Energy Plus, or equivalent), including ingestion of structured exports (CSV/XML) and mapping to internal data entities and DOE data fields.

4.5.1.3. Provide data structures that map directly to DOE/PNNL APIs and any successor interfaces.

4.5.1.4. Implement secure, logged, transactional or batch submission to DOE/PNNL APIs with status tracking and error handling.

4.5.1.5. Treat DOE Excel templates as data specifications, not submission formats (i.e., the platform should not rely on manual spreadsheet uploads to DOE).

4.5.1.6. Include automated error handling and retry logic to queue data during federal system downtime without losing records, and to re-try failed submissions with clear error reporting.

4.5.2. The Vendor must describe how the solution will maintain compatibility with future DOE/PNNL changes over the five-year term, including configuration or code changes, testing, and deployment processes.

4.6. Report Integration

4.6.1. The Vendor shall implement an integration layer that:

4.6.1.1. Establishes a secure integration between the new platform and Resource Smart's existing systems.

4.6.1.2. Uses APIs, webhooks, or real-time event triggers to exchange key data and status changes (e.g., "Audit Complete," "Application Approved," "Rebate Issued") between systems.

4.6.1.3. Defines clear system-of-record rules for each major data entity (e.g., where the authoritative record for a project, measure, or rebate resides).

4.6.1.4. Produces a Solution Architecture Document and an Interface Control Document ("ICD") that define:

4.6.1.5. Data payloads and field mappings.

4.6.1.6. Event triggers and frequencies.

4.6.1.7. Error handling and reconciliation processes.

4.7. Energy Data Ingestion & Validation

4.7.1. The integration layer and platform must also support:

4.7.1.1. Native parsing of structured data files (e.g., CSV/XML) exported from energy modeling tools to extract key savings metrics and related attributes.

4.7.1.2. Optical Character Recognition (OCR) or text-scraping capability for standardized PDF reports where necessary, with a data verification user interface for human review and approval before committing to the database.

4.7.1.3. Logging and traceability from the original modeling output to resulting program records and DOE/PNNL API payloads.

4.7.2. The solution must be designed so that, over time, other internal tools can coexist with the new platform, without constraining future evolution of the overall system architecture.

4.8. Data Automation and Integration

4.8.1. The system must:

4.8.1.1. Maximize automation of data flows, validation, and updates across all modules.

4.8.1.2. Maintain a single logical source of truth, even when data is synchronized across multiple systems (e.g., platform and Smartsheets).

4.8.1.3. Implement automated business rules for validation (e.g., income thresholds, measure caps, duplicate checks).

4.8.1.4. Implement automated external integrations (DOE/PNNL, utilities, telephony, accounting systems, etc.) with logging of all significant automated actions.

4.8.1.5. Provide robust error handling, notifications, and exception management for integration failures.

5. Technical & Security Requirements

5.1. The solution must:

5.1.1. Be built on an enterprise-grade, modern technology stack with a clear roadmap and support model.

5.1.2. Support role-based access control and least-privilege authorization.

5.1.3. Provide encryption in transit (e.g., TLS 1.2+) and at rest for sensitive data.

5.1.4. Maintain detailed audit logs of key actions (logins, record changes, approvals, data exports, API calls).
5.1.5. Provide data retention, archival, and deletion controls that align with DOE, NJBPU, and state record retention requirements.
5.1.6. Support integration with a modern identity provider for Single Sign On (SSO) (e.g., SAML, OpenID Connect).
5.1.7. Support privacy controls consistent with Resource Smart's Data Access Plan and Consumer Protection Plan, including restricted access to sensitive PII and income documentation.
5.1.8. Vendors must describe their security, privacy, and compliance approach, including how they will support DOE and State security/privacy assessments and penetration testing, and how vulnerabilities will be remediated.

6. Implementation Services

6.1. Vendors must provide full implementation services, including:
6.1.1. Requirements gathering and detailed design.
6.1.2. Configuration and/or customization of the selected platform.
6.1.3. Integration development (customers, DOE/PNNL, modeling tools, and other agreed systems).
6.1.4. Data migration from any legacy or interim systems, where in scope.
6.1.5. Environment setup for development, testing, staging, and production.
6.1.6. Testing (unit, system, integration, performance, user acceptance).
6.1.7. Documentation (technical, administrative, and end-user).
6.1.8. Training and knowledge transfer for different user roles.
6.1.9. Go-live planning and support (cutover, hyper-care).
6.2. The Vendor shall propose a phased implementation plan with milestones, timeline, and required client resources. User Acceptance Testing ("UAT") criteria and processes must be clearly defined and aligned to contractual acceptance and milestone payments.

7. Three-Year Operations, Maintenance & Enhancements

7.1. The Vendor shall provide a 3-year maintenance and support agreement that includes:
7.2. Defined SLAs for:
7.2.1. System uptime (e.g., target ≥99.5% excluding scheduled maintenance).
7.2.2. Response and resolution times by incident severity.
7.2.3. Recovery Targets (RTO/RPO)for disaster recovery.
7.2.4. Routine maintenance (patching, minor updates, performance tuning).
7.2.5. Ongoing support (help desk, knowledge base, escalation paths).
7.2.6. Enhancement/change management process, including:
7.2.7. Intake and prioritization of enhancement requests.
7.2.8. Regular release cadence (e.g., minor releases, major releases).
7.2.9. Impact assessment and regression testing practices.
7.2.10. Specific commitments to maintain compliance with evolving DOE, NJBPU, and federal/state requirements (e.g., changes to DOE 50121, PNNL APIs, or program rules)
7.3. Vendors must clearly distinguish between services included in base maintenance and those provided on a time-and-materials or change-order basis.

8. Business Process Documentation and Improvements

8.1. The selected Vendor will provide structured Business Process Optimization (“BPO”) support focused on business process documentation, standardization, and continuous improvement in connection with the design, implementation, and operation of the platform and other scope of work described in this RFP.

8.2. The intent is to ensure that the technology solution is tightly aligned with Resource Smart’s and NJBPU’s operational practices, that SOPs are clearly documented and maintained, and that process improvements are systematically identified and implemented over time.

8.3. Objectives: BPO services shall:

8.3.1. Document the current (“as-is”) business processes used by Resource Smart in the design, creation, and operation and maintenance of its website, processes, portals, and related program workflows.

8.3.2. Develop standardized SOPs, process maps, and matrices for key program functions (e.g., intake, eligibility, project review, rebate approval, QA/QC, consumer protection, complaints, financials, reporting).

8.3.3. Identify gaps, inefficiencies, and risks in current processes and propose process improvements that leverage the capabilities of the new platform and website.

8.3.4. Support change management and training, ensuring staff understand and adopt the improved processes and underlying system workflows.

8.3.5. Establish a continuous improvement framework and cadence for reviewing and refining processes and SOPs over the term of the engagement.

8.4. Scope of Work

8.4.1. At a minimum, the Vendor shall perform the following BPO tasks:

8.4.1.1. BPO process inventory and as-is documentation.

8.4.1.2. Conduct interviews, workshops, and job-shadowing with Resource Smart program, operations, IT, finance, and management staff.

8.4.1.3. Develop a process inventory of all major business processes related to:

8.4.1.3.1. Application intake and eligibility determination

8.4.1.3.2. Project and rebate management

8.4.1.3.3. QA/QC and inspections

8.4.1.3.4. Consumer protection and complaint handling

8.4.1.3.5. Timekeeping and labor allocation

8.4.1.3.6. Invoicing and financial management

8.4.1.3.7. Data management and reporting (NJBPU, DOE/PNNL, other stakeholders)

8.4.1.4. For each major process, produce documentation, which may include:

8.4.1.4.1. Narrative descriptions

8.4.1.4.2. Swimlane or BPMN-style process maps.

8.4.1.4.3. Inputs/outputs, handoffs, systems used, and decision points

8.4.1.4.4. Roles and responsibilities (RACIs or equivalent)

8.5. SOP Development & Standardization

8.5.1. Translate as-is processes into draft SOPs, including step-by-step procedures, controls, and required documentation.

8.5.2. Identify where existing SOPs, job aids, or guides can be consolidated or retired to avoid duplication.

8.5.3. Develop a standard SOP template (approved by Resource Smart) and use it consistently across all documented processes.

8.5.4. Ensure SOPs clearly reference and align with:

8.5.4.1. Program requirements and guidance from NJBPU and DOE

8.5.4.2. 2 CFR 200 requirements relevant to timekeeping, financials, and documentation

8.5.4.3. Internal policies (e.g., consumer protection plan, data access plan, privacy and security requirements)

8.5.4.4. Business Process Optimization (BPO) To-Be Design & Process Improvement Roadmap

8.5.5. Based on as-is analysis and platform capabilities, propose to-be (future-state) process designs that:

8.5.5.1. Reduce manual work and handoffs

8.5.5.2. Increase automation, standardization, and data quality

8.5.5.3. Strengthen internal controls, compliance, and auditability

8.5.5.4. Improve stakeholder experience (contractors, property owners, tenants/households, NJBPU, DOE)

8.5.5.5. Document to-be processes using updated process maps and SOPs.

8.5.6. Develop a prioritized process improvement roadmap, indicating:

8.5.6.1. Short-term changes to be implemented with the initial platform deployment

8.5.6.2. Medium- and long-term improvements to be implemented via future releases or process updates

8.5.6.3. Dependencies, risks, and expected benefits (e.g., cycle-time reduction, error reduction)

8.6. Process / Platform Alignment

8.6.1. Work closely with the platform implementation team to ensure that:

8.6.1.1. Workflows, data models, and automation rules in the system are consistent with the agreed to-be processes.

8.6.1.2. SOPs reference the actual screens, fields, queues, and reports in the platform and portals.

8.6.1.3. Changes in process are reflected in configuration and vice versa (change-control).

8.6.1.4. Participate in configuration and UAT discussions to validate that the system supports the approved to-be processes.

8.7. Training, Change Management & Adoption Support

8.7.1. Develop process-focused training materials (e.g., process overviews, step-by-step guides, quick-reference job aids) built directly from the documented SOPs and process maps.

8.7.2. Assist Resource Smart in delivering training to staff and, where appropriate, external stakeholders (e.g., contractors, owners).

8.7.3. Support change management activities, which may include:

8.7.3.1. Stakeholder impact analysis by role/team

8.7.3.2. Communications plans and key messages

8.7.3.3. Feedback mechanisms to capture issues and improvement ideas during and after go-live

8.8. Continuous Improvement Framework

8.8.1. Propose and help establish a governance structure and cadence for ongoing process review and improvement (e.g., quarterly process review meetings, annual SOP refresh).

8.8.2. Define process performance indicators (e.g., application-to-approval cycle time, complaint resolution time, QA/QC rework rates) and how they will be monitored via the platform's reporting and dashboards.

8.8.3. Provide recommendations and supporting templates for how Resource Smart will maintain and update SOPs, process maps, and training materials over time, including integration with change-management and release-management practices.

8.9. Deliverables

8.9.1. At minimum, the Vendor shall provide the following deliverables:

8.9.1.1. Process Inventory & As-Is Documentation Package, including:

8.9.1.1.1. Process inventory spreadsheet or catalog

8.9.1.1.2. As-is process maps (swimlane/BPMN or equivalent)

8.9.1.1.3. As-is process narratives and RACI matrices

8.9.1.1.4. SOP Library (Initial Release), including:

8.9.1.1.5. Standard SOP template

8.9.1.1.6. SOPs for all key processes in scope, cross-referenced to systems, roles, and controls

8.9.1.2. To-Be Process Design & Improvement Roadmap, including:

8.9.1.2.1. To-be process maps and SOPs

8.9.1.2.2. Prioritized roadmap of improvements with timelines and dependencies

8.9.1.2.3. Training and change management materials, including:

8.9.1.2.3.1. Process-based training decks, job aids, and quick-reference guides

8.9.1.2.3.2. Recommended communication plan outline and feedback mechanisms

8.9.1.3. Continuous Improvement Framework & Governance Guide, including:

8.9.1.3.1. Proposed governance structure (roles, forums, cadence)

8.9.1.3.2. Example KPIs and reporting views for process performance

8.9.1.3.3. Procedures for ongoing SOP and process documentation maintenance

8.9.2. All BPO deliverables will be provided in mutually agreed formats (e.g., Word, Excel, PDF, and/or diagramming formats) and will be considered work-for-hire, with all rights and ownership vested in Resource Smart as specified in the final contract.

8.10. Collaboration and Responsibilities

8.10.1. Resource Smart will designate process owners and subject matter experts to participate in workshops, reviews, and approvals.

8.10.2. The Vendor is responsible for facilitating sessions, drafting documentation, incorporating feedback, and delivering finalized artifacts.

8.10.3. The Vendor must coordinate BPO activities with the broader platform implementation schedule to avoid duplication of effort and to ensure that process work informs, and is informed by, system design and configuration.

9. VENDOR QUALIFICATIONS

9.1. Offerors must demonstrate:

9.1.1. Experience implementing and supporting enterprise-grade program administration or case-management platforms for public sector, utility, or grant-funded programs.

9.1.2. Evidence of at least three (3) successful API integration projects, perhaps even for the DOE HER/HEAR rebate program for another state.

9.1.3. Experience in high-compliance environments (e.g., SOC 2, ISO 27001, or equivalent; experience with FedRAMP-authorized environments is a plus).

9.1.4. Experience designing and implementing portals for external stakeholders (contractors, property owners, households).

9.2. References for at least three (3) relevant projects of similar scale and complexity, including contact information.

9.3. Financial stability (e.g., audited financial statements or equivalent financial documentation for the past two fiscal years).

10. PROPOSAL SUBMISSION REQUIREMENTS

10.1. Proposals must include, at minimum:

10.1.1. Cover letter

10.1.2. Company profile (ownership, size, locations, key lines of business).

10.1.3. Relevant experience and references (including project summaries and client contacts).

10.1.4. Technical approach, including:

10.1.4.1. Proposed platform and architecture.

10.1.4.2. Data model, workflows, portals, and integrations.

10.1.4.3. Approach to integration with Resource Smart's existing systems.

10.1.4.4. DOE/PNNL 50121-aligned forms and API integration (no spreadsheet submissions)

10.1.4.5. Data automation and real-time dashboards.

10.1.4.6. Implementation plan and schedule, including phases, milestones, and required client resources.

10.1.5. Support & Maintenance Plan, including SLAs and change-management approach.

10.1.6. Staffing Plan & Key Personnel, including resumes for key roles.

10.1.7. Security & Compliance Approach, including data protection, privacy, and incident response.

10.1.8. Pricing Proposal, including:

10.1.8.1. One-time implementation costs by major workstream.

10.1.8.2. Recurring licensing/subscription and hosting costs.

10.1.8.2.1. If the proposed solution includes any commercial software platform and/or SaaS tools, Offerors must include all required licensing/subscription/usage fees within the Three-year Operations & Maintenance (O&M) costs (or as a clearly identified recurring O&M

line item); proposals that exclude these costs may be deemed non-responsive.

10.1.8.3. Three-year operations and maintenance costs.
10.1.8.4. Rates for out-of-scope enhancements or change orders.
10.1.8.5. Exceptions and assumptions to the RFP terms and requirements

10.1.9. Proposals should be clear, concise, and complete. Resource Smart may request additional information or clarification.

11. EVALUATION CRITERIA

Proposals will be evaluated using the criteria and weights outlined below:

	Criteria	Weight
11.1.	Technical Approach & Architecture (incl. API/Data)	30%
11.2.	Relevant Experience (HER/HEAR, DOE, utility/state)	10%
11.3.	Cost Proposal & Three-Year Total Value	40%
11.4.	Compliance, Security & Data Governance Approach	10%
11.5.	NJ Small Business / MBE / WBE Status (if applicable)	10%

Resource Smart will reserve the right to:

11.6. Conduct interviews or oral presentations.
11.7. Request demonstrations or sandbox access.
11.8. Negotiate scope, terms, and pricing with one or more Offerors.
11.9. Make an award based on overall best value.

12. ADMINISTRATIVE INFORMATION

12.1. Questions & Clarifications

12.1.1. All questions must be submitted in writing to the RFP Contact by Jan. 9th 2026/5:00pm, ET. Responses will be provided to all known prospective Offerors, in anonymized form, by Jan. 16th 2026/5:00pm

12.2. Proposal Submission

12.2.1. Proposals must be submitted electronically in PDF format to:

12.2.1.1. Email: IvanG@resourcesmart.net
12.2.1.2. Subject Line: "[RFP No.] – Program Administration Platform Proposal – [Vendor Name]"

12.3. Proposals are due by Jan. 30th 2026/5:00pm Late proposals may be rejected at the sole discretion of Resource Smart.

13. Confidentiality & Public Records

13.1. Offerors should clearly mark proprietary or confidential content in their proposals. Resource Smart will comply with applicable public records laws. If a proposal is subject to a public records request, Resource Smart will follow applicable procedures. Offerors may be required to justify any requested redactions.

13.2. Reservation of Rights

13.2.1. Resource Smart reserves the right to:

13.2.1.1. Reject any or all proposals.
13.2.1.2. Waive minor informalities or irregularities.
13.2.1.3. Negotiate terms and conditions.

13.2.1.4. Cancel or re-issue this RFP at any time.
13.2.1.5. Make one or multiple awards, or no award.

14. CONTRACT TYPE & TERM

14.1. Resource Smart anticipates entering into a Project Delivery engagement for:

14.1.1. Initial implementation: Fixed-Price contract tied to defined milestones (e.g., design completion, UAT acceptance, go-live).

14.1.2. Ongoing operations and maintenance: A three-year support and maintenance agreement with defined SLAs, renewal or extension options, and clearly specified base vs. change-order services.

14.1.3. Final contract terms will be negotiated with the selected Vendor.

15. ATTACHMENTS

15.1. Attachment A – Illustrative Scope of Work Schedule (Phasing & Milestones)
15.2. Attachment B – Evaluation Scorecard Template (Internal Use)
15.3. Attachment C – DOE Rebate Reservation Data Templates (Sample)
15.4. Exhibit A – Mandatory Equal Employment Opportunity Language

Attachment A
Illustrative Scope of Work Schedule (Phasing & Milestones)

This Attachment A provides an illustrative, fast-track schedule for delivery of a public-facing program website with intake functionality and a backend platform that receives and stores submitted data, followed by a full production go-live by April 30, 2026. Offerors shall propose a final schedule with equivalent/ faster delivery or timeline they can complete this in, including staffing assumptions and dependencies.

Timing Basis:
Proposal Due Date: January 30, 2026 (5:00 PM ET)
Anticipated Vendor Selection: February 1, 2026
Notice to Proceed (illustrative): February 2, 2026
MVP Release (website + intake + backend load): March 3, 2026 (within 30 days of NTP)
Production Go-Live: No later than April 30, 2026

Workstreams (run in parallel):
Website + Intake (public site, intake forms, validation, confirmations).
Platform Configuration + Workflow (case/project lifecycle, roles/permissions, audit trail).
Integrations + Data Model (interface specifications, payload mapping, error handling/reconciliation, API).
Security/Privacy + Environments (dev/test/stage/prod, access controls, logging, incident processes).
Reporting + Dashboards (baseline KPIs, operational and compliance reporting).

Milestones and Phases (Illustrative)

Milestone ID	Dates	Phase	Key Deliverables	Acceptance / Exit Criteria
M0	Feb 2–Feb 6, 2026	Mobilization & Sprint 0	Kickoff; governance and cadence; environments (dev/test/stage/prod); security baseline; initial backlog and release plan.	Project plan baseline approved; environments available; roles/RACI confirmed; acceptance process and definition of done agreed.
M1	Feb 2–Feb 14, 2026 (overlaps M0)	Architecture & Integration Design (Wave 1)	Solution Architecture Document (v0.9) and Interface Control Document (ICD v0.9); system-of-record rules; integration patterns; error handling and reconciliation approach.	Resource Smart approval of architecture/ICD v0.9 sufficient to build; open items logged with due dates for v1.0 finalization.

Milestone ID	Dates	Phase	Key Deliverables	Acceptance / Exit Criteria
M2 (MVP)	Feb 2–Mar 3, 2026	Website + Intake + Backend Load (MVP Release)	Branded public website; web intake forms; data validation; intake submissions create and attach records in backend platform; admin review screen; audit logging; basic dashboards.	MVP demonstrated in staging; intake data persists correctly; role-based access enforced; MVP acceptance checklist completed.
M3	Mar 4–Mar 21, 2026	Core Platform Configuration (Release Candidate 1)	End-to-end workflows (intake to eligibility to project tracking to QA/QC hooks to rebate processing states); notifications; document capture; finalized Architecture + ICD v1.0.	Feature-complete RC1 available in staging; workflow scenarios pass; architecture/ICD v1.0 approved.
M4	Mar 9–Apr 10, 2026 (overlaps M3/M5)	Integrations & Data Automation	Implement prioritized integrations (including DOE/PNNL, as applicable); automated data transfers; logging/traceability; exception management and reconciliation workflows.	End-to-end integration tests pass; error handling and reconciliation validated; traceability demonstrated from source record to outbound payload.
M5	Apr 1–Apr 18, 2026	Testing + UAT + Training	System/integration/performance testing; UAT scripts and execution; user training; cutover plan; go-live runbook and monitoring/alerting plan.	Signed UAT acceptance; training completed; go-live readiness review passed; severity thresholds met per agreed criteria.
M6 (Go-Live)	Apr 20–Apr 30, 2026	Production Cutover + Hypercare	Production deployment; cutover execution; hypercare and stabilization; incident triage; operational handoff to O&M support model.	Production go-live completed no later than Apr 30, 2026; critical defects resolved or mitigated; support handoff initiated.

Attachment B

EVALUATION SCORECARD TEMPLATE (INTERNAL USE)

RFP No.: 2026-010
Project: Program Administration Platform & Website Development
Offeror: ____
Evaluator: ____
Evaluation Date: _______________________________________
Round (Initial / Final): _________________________________

Scoring Scale (Use Whole Numbers)

- 5 = Exceptional (exceeds requirements; low risk)
- 4 = Very Good (exceeds some requirements; low/moderate risk)
- 3 = Meets Requirements (acceptable; moderate risk manageable)
- 2 = Partially Meets (gaps; higher risk; mitigation required)
- 1 = Poor (major gaps; high risk)
- 0 = Not Addressed / Unacceptable

Weighted Points Calculation (per row): (Score / 5) x Weight Points

A. Responsiveness / Mandatory Submission Check (Pass/Fail)
Mark PASS only if the item is included and responsive.

#	Requirement	Pass	Fail	Notes
A1	Proposal received by due date/time	☐	☐	
A2	Technical approach included (architecture, data model, workflows, portals, integrations)	☐	☐	
A3	DOE/PNNL 50121-aligned forms and API integration approach (no spreadsheet submissions)	☐	☐	
A4	Implementation plan and schedule (phases/milestones/client resources)	☐	☐	
A5	Security and compliance approach included	☐	☐	
A6	Pricing proposal includes: one-time implementation; recurring hosting; recurring licensing/subscription; and three-year O&M/support	☐	☐	
A7	If commercial software/SaaS is proposed, licensing/subscription/usage fees are included in the three-year O&M (or clearly identified as required recurring O&M line item)	☐	☐	
A8	Three (3) relevant references provided with contact information	☐	☐	
A9	Financial stability documentation (e.g., audited financials or equivalent for past two fiscal years)	☐	☐	

A10	Source disclosure: services performed within the United States	☐	☐	
A11	Pay-to-Play disclosure compliance (Chapter 51 / Executive Order 117 certification)	☐	☐	
A12	Cybersecurity incident reporting acknowledgement (72-hour reporting)	☐	☐	

B. Weighted Technical/Cost Evaluation (100 Points Total)

Summary Score Table

Criterion	Weight Points	Raw Score (0–5)	Weighted Points	Notes
1. Technical Approach and Architecture (incl. API/Data)	30			
2. Relevant Experience (HER/HEAR, DOE, utility/state)	10			
3. Cost Proposal and Three-Year Total Value	40			
4. Compliance, Security and Data Governance Approach	10			
5. NJ Small Business / MBE / WBE Status (if applicable)	10			
TOTAL	100			

1) Technical Approach and Architecture (30 Points)
Score this criterion overall as one 0–5 score in the Summary Score Table; use the sub-criteria below to justify the rating.

Sub-criterion	Suggested Share (Guide)	Raw (0–5)	Notes / Evidence
1.1 Proposed platform and architecture (scalability, modularity, maintainability)	8		
1.2 Data model and workflow design (intake to eligibility to QA/QC to rebates to complaints to reporting)	6		
1.3 Portal/website UX approach (external stakeholders; branded public site and secure portals)	5		
1.4 Integration approach (Resource Smart systems; APIs/webhooks/events; DOE/PNNL API alignment)	7		
1.5 Data automation and real-time dashboards/reporting	4		

2) Relevant Experience (10 Points)

Sub-criterion	**Suggested Share (Guide)**	**Raw (0–5)**	**Notes / Evidence**
2.1 Similar implementations (public sector/utility/grant-funded program administration platforms)	4		
2.2 Evidence of three (3) or more successful API integration projects (DOE HER/HEAR a plus)	3		
2.3 Experience with external stakeholder portals	2		
2.4 References quality/relevance	1		

3) Cost Proposal and Three-Year Total Value (40 Points)

Cost Component	**Amount**	**Notes**
One-time implementation	$	
Year 1 O&M/support	$	
Year 2 O&M/support	$	
Year 3 O&M/support	$	
Licensing/subscription/usage (3-year total)	$	
Hosting (3-year total)	$	
Total Evaluated Cost (TEC)	$	

4) Compliance, Security and Data Governance Approach (10 Points)

Sub-criterion	**Suggested Share (Guide)**	**Raw (0–5)**	**Notes / Evidence**
4.1 Data protection/privacy, incident response, and compliance controls	4		
4.2 Identity/access controls, audit logs, and governance/retention	3		
4.3 Secure integration patterns (API security, secure transfer)	3		

5) NJ Small Business / MBE / WBE Status (10 Points)

Status Submitted	**Raw (0–5)**	**Notes / Evidence**
Documented NJ Small Business / MBE / WBE certification (if applicable)		

Attachment C
DOE Rebate Reservation Data Templates (Sample)

Please see attached Excel File.

EXHIBIT A

MANDATORY EQUAL EMPLOYMENT OPPORTUNITY LANGUAGE

During the performance of this contract, the contractor agrees:

1. The contractor or subcontractor, where applicable, will not discriminate against any employee or applicant for employment because of age, race, creed, color, national origin, ancestry, marital status, affectional or sexual orientation, gender identity or expression, disability, nationality, or sex. The contractor will ensure that equal employment opportunity is afforded in all employment actions, including but not limited to recruitment, hiring, promotion, demotion, transfer, layoff, termination, compensation, and training.
2. The contractor or subcontractor, where applicable, will, in all solicitations or advertisements for employees placed by or on behalf of the contractor, state that all qualified applicants will receive consideration for employment without regard to age, race, creed, color, national origin, ancestry, marital status, affectional or sexual orientation, gender identity or expression, disability, nationality, or sex.
3. The contractor or subcontractor will send to each labor union, with which it has a collective bargaining agreement, a notice advising the labor organization of the contractor's commitments under this chapter and shall post copies of the notice in conspicuous places available to employees and applicants for employment.

Pay-to-Play Disclosure

The Vendor must comply with P.L. 2005, c. 51 (Chapter 51) and Executive Order 117. Vendors must verify that they have not made disqualifying political contributions. The selected Vendor must submit the Chapter 51/Executive Order 117 Vendor Certification as required.

Cybersecurity Incident Reporting

In accordance with New Jersey P.L. 2023, c. 19, the Vendor agrees to report any cybersecurity incident that compromises the confidentiality, integrity, or availability of program data to the New Jersey Office of Homeland Security and Preparedness (NJOHSP) via the New Jersey Cybersecurity and Communications Integration Cell (NJCCIC) within seventy-two (72) hours of discovery.

Source Disclosure

Pursuant to N.J.S.A. 52:34-13.2, all services performed under this contract, including any subcontracted work (coding, support, data processing), must be performed within the United States.

Equal Employment Opportunity

Mandatory Equal Employment Opportunity language, as required by N.J.S.A. 10:5-31 et seq. (P.L. 1975, c. 127) and N.J.A.C. 17:27, is included as Exhibit A and will be incorporated into the final contract.