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SOUTHEAST ALASKA REGIONAL DEVELOPMENT ORGANIZATION

**Request for Qualifications and Proposals (RFQP)  
JOLT Platform Stabilization & Enhancement for ACES  
#2026-03**

Issued by: Southeast Conference (SEC)

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Proposal Due Date: May 15, 2026

**SECTION 1 – SUMMARY**

Southeast Conference (SEC) is seeking proposals from qualified software development teams to stabilize, enhance, and operationalize the JOLT application platform to support the public application and long-term administration of the Accelerating Clean Energy Savings (ACES) program (3 more years).

The selected contractor will work within the current architecture of the JOLT platform (and with our partner and the owner and administrator of JOLT, Alaska Housing Finance Corporation or AHFC) to enhance and modify the form builder functionality as needed in order to deliver a secure, scalable, and user-configurable platform capable of supporting high-volume program delivery, while reducing administrative burden and improving applicant and contractor experience.

SEC seeks a development partner who can not only implement required functionality, but also recommend improvements to system architecture, performance, and usability based on demonstrated experience with similar platforms.

**SECTION 2 – BACKGROUND AND CONTEXT**

**2.1 About Southeast Conference (SEC)**

Southeast Conference is a regional nonprofit organization serving communities across Southeast Alaska. SEC works collaboratively with local governments, tribes, utilities, and partners to advance economic development, energy resilience, and sustainable infrastructure. SEC is the recipient of a Climate Pollution Reduction Grant (CPRG) awarded by the U.S. Environmental Protection Agency to administer the ACES program.

## **2.2 About the ACES Program**

The Accelerating Clean Energy Savings (ACES) program is designed to reduce household energy costs and improve comfort by supporting the installation of cold-climate heat pumps in homes across coastal SE Alaska, from Metlakatla to Kodiak. The program provides

households with an energy assessment and places particular emphasis on rural communities and households with high energy burdens.

Southeast Conference is responsible for achieving approximately 6,100 residential heat pump installations over five years. This scale requires a secure, efficient, and highly reliable application and workflow platform capable of supporting the full lifecycle of each customer file, including secure management of personal information; timestamping and administrative logging for compliance and accountability; household application intake and document uploads; automated and manual email correspondence with customers; eligibility screening; recording of energy assessment documentation and task completion; tracking of each application through the various stages of the rebate program; contractor coordination; reimbursement submission; rebate processing; and program reporting.

## **2.3 About the JOLT Platform**

JOLT is a state-owned application platform administered by AHFC and intended to support energy efficiency and renewable energy programs. Although the platform includes foundational capabilities such as application intake, document upload, and workflow tracking, it is not currently ready to support high-volume public deployment for a program administered outside of AHFC. In its current state, the platform does not provide SEC and its project team with the independence needed to manage application records, customer communications, and workflow without ongoing AHFC involvement. Key functionality also remains incomplete: the energy assessment tool is not integrated into JOLT (this is where the majority of our EPA semi-annual reporting data is housed), and heat pump installation partners cannot be granted secure, limited-access accounts to view project status or upload required documents without exposing customers' private personal information (PPI).

SEC testing and program implementation have identified the following key limitations:

### **2.3.1 Application Reliability Issues and User Experience Challenges**

- Inconsistent form saving behavior and ease of use for customer – Slow load times, submission failures due to error handling, form fields and signature issues, inaccurate or changing field values during entry, inconsistent and incorrect identification of errors when submission fails, inconsistent interface behavior
- Confusing document upload processes for customer

- No Admin level (ACES program staff) control to modify application language for clarity

### **2.3.2 Administrative Constraints**

- Inability for Admin level (ACES program staff) to modify forms, rules, or customize communications with/for the applicants without AHFC IT support
- Limited ability to correct, return, or recover applications once errors occur
- Lack of workflow configurability and program control without AHFC support
- Inability to control or edit automatic emails at the Admin level for specific customer needs

### **2.3.3 Document and Data Management Gaps**

- Fragmented document storage creating a lack of consistent visibility of uploaded materials, staff need to add naming conventions and organize documentation
- Limitations of file type that can be uploaded and viewed
- Without limited access accounts, heat pump contractors cannot assist ACES customers by uploading documentation

### **2.3.4 System Integration (data gap) and Duplication**

- No integration with our external heat pump calculator, requiring the admin team to have duplicate data entry and parallel tracking systems for all energy related data

### **2.3.5 Missing External User Functionality – duplicative of 2.3.3**

- No contractor or energy assessor portal for secure customer personal information privacy. Inability for energy assessors or heat pump installation contractors to use the program for document storage and reporting purposes

These limitations currently require significant manual workarounds and present a barrier to program scale and public launch of the JOLT application to ACES.

## **SECTION 3 – PURPOSE AND INTENT OF THIS RFQP**

The purpose of this RFQP is to engage a qualified contractor to address critical functionality gaps in the JOLT platform and transform it into a stable, configurable, and scalable system capable of supporting full public deployment of the ACES program from application through reporting. The outcome of the work should provide independent program administration and

set us up for secure role-based access, integrated tools, and high-volume application processing.

The selected contractor will deliver a system in which:

- The core workflows will operate reliably without data loss or submission failure
- Non-technical program staff (admin) can independently edit and manage forms, workflows, permissions and communications with customers
- Applicants and contractors experience a clear, intuitive, and consistent interface
- Required program data is captured, stored, and reportable within a single system
- External tools and program participants are integrated into a unified workflow
- The platform can scale to support sustained, high-volume program delivery

A more detailed functional requirements list is provided in **Appendix A**.

## **SECTION 4 – OBJECTIVES**

This engagement is intended to achieve the following outcomes:

**4.2 Launch Readiness** - Eliminate blocking defects and ensure reliable application submission, communication abilities and processing

**4.3 Operational Independence** - Provide SEC with the ability to manage program configuration and administration without reliance on AHFC or ongoing developer support

**4.4 Workflow Integrity** - Continue to ensure consistent, traceable, and recoverable workflows across the full application lifecycle, with added features

**4.5 User Experience** - Deliver a clear and intuitive interface for applicants and administrators, with optional contractor access if feasible within budget; if a contractor portal is not feasible in the budget of this RFQP, ensure that integration will be possible without any major changes to the architecture built

**4.6 System Integration** - Consolidate program functions and improve the JOLT held data to achieve a cohesive system of record for reporting purposes including the potential integration of the energy assessment tool

**4.7 Scalability & Performance** - Support sustained program delivery at scale (2,000+ applications annually)

**4.8 Data Integrity & Compliance** - Ensure secure handling of sensitive data, with full auditability and if costs allow role-based access controls for contractors to upload documentation.

## **SECTION 5 – SCOPE OF WORK (PERFORMANCE-BASED)**

The contractor shall deliver a fully operational platform that achieves the outcomes described in Section 3 and 4 and outlined in Appendix A.

At a minimum, the system shall:

### **5.1 Application & Form Configuration**

- Enable non-technical staff to create, edit, and manage application forms and eligibility rules
- Support dynamic and conditional application logic
- Allow modification of applicant-facing content without developer intervention

### **5.2 Workflow & Administrative Controls**

- Provide configurable workflow stages, approvals, and transitions
- Allow staff to correct, return, or recover applications at any stage

Enable role-based permissions and team-based workflow management

### **5.3 Communication & Notification System**

- Enable staff to configure automated communications, reminders, and notifications
- Support dynamic content insertion and conditional messaging

### **5.4 Document & Data Management**

- Provide centralized, organized, and clearly accessible document management
- Enable consistent tracking of application status, deadlines, and required actions

### **5.7 Performance & Reliability**

- Ensure consistent performance across devices and internet conditions
- Eliminate data loss, submission errors, and synchronization issues
- Ensure that conditional options 1 and 2 can be added without any major architectural changes

## 5.6 System Integration (conditional option 1)

- Integrate external tools (including heat pump calculator functionality) into the application workflow
- Eliminate duplicate data entry and parallel tracking systems

## 5.5 External User Access (conditional option 2)

- Provide secure access for contractors and/or third-party participants
- Enable document submission and workflow participation by external users

## SECTION 6 – DELIVERABLES (OUTCOME-BASED)

The contractor shall provide the following deliverables to demonstrate successful implementation:

- 6.1** Production-ready JOLT platform capable of supporting public launch without critical defects, configured for ACES program use, and an architecture for continued development
- 6.2** A configured administrative interface enabling ACES staff to manage applications, workflows, communications, program settings and reporting without AHFC developer support
- 6.3** Fully functional application workflow, including submission, review, approval, document management, and status tracking across all stages of the program's requirements
- 6.4** Performance testing results and documentation, demonstrating system stability and responsiveness under expected program load (2,000+ applications annually), on multiple customer device types and in areas of slow internet performance.
- 6.5 System documentation**, assist in updating/providing an architecture overview, configuration guidance, and/or user manuals-type information for administrators and external users as needed to ensure we gain the full benefits of the improvements. Brief but effective **training sessions and materials** sufficient to enable SEC staff and partners to operate and maintain the system at the time of contract close.
- 6.6** Conditional option 1 - Integrated system architecture that eliminates duplicate data entry for program reporting purposes. **System integration components** that eliminate duplicate data entry and support incorporation of the energy assessment

tool (or a defined integration pathway, if full integration is not feasible)

**6.7** Conditional option 2- A **role-based access control system**, including secure external user accounts for contractors with restricted access to protect private personal information (PPI)

## **SECTION 7 – TIMELINE & PHASING**

This project is time-sensitive and supports the public launch of the ACES program JOLT application portal.

### **7.1** Phase 1 – Stabilization & Launch Readiness

Critical defects, identity handling, workflow synchronization, performance blockers. Form builder, email framework, timing rules, document management.

### **7.2** Phase 2 – Integration of the Energy Assessment Calculator

Calculator integration, extended reporting support

### **7.3** Phase 3 – Contractor Portal & Integration

Role-based contractor access

Offerors may propose alternative phasing if it supports faster delivery.

## **SECTION 8 – RESPONSES**

Interested offerors must submit the following:

**8.1** Cover letter with firm name, contact information, and authorized signature.

**8.2** Company overview and relevant experience.

**8.3** Description of project team and key personnel.

**8.4** Technical approach and methodology.

**8.5** Proposed timeline and phasing plan.

**8.6** Cost proposal with itemized estimates based on the conditional and phased items.

**8.7** Examples of similar projects.

**8.8** Three professional references.

**8.9** Confirmation of ability to comply with 2 CFR 200, 2 CFR 1500, and EPA CPRG requirements.

Proposals shall be submitted electronically in PDF format to [info@seconference.org](mailto:info@seconference.org)

## **APPENDIX A – DETAILED FUNCTIONAL REQUIREMENTS**

### **A1. Application Form Builder & Configuration Tools**

The deliverable is a comprehensive administrative interface enabling ACES staff to independently manage application forms.

#### **Functional Requirements:**

##### **A1.1 Form Structure Management**

- i. Add, remove, reorder, and modify application questions
- ii. Configure multiple question types (text, dropdown, checkbox, radio, file upload, etc.)
- iii. Implement conditional logic based on applicant responses. Example: Do you own your home and reside in it at least 50% of the year?
- iv. Group questions into logical sections and multi-step workflows. Configure multi-step or single-page form layouts.

##### **A1.2 Content Management**

- i. Edit question text, help text, and instructions (place holders).
- ii. Update eligibility criteria and applicant-facing messaging such as guidance text, disclaimers and instructions.
- iii. Configure field validation rules (required fields, format requirements, field limits).

##### **A1.2 Administrative Permissions Management**

- Be able to preview changes prior to publishing
- Maintain version control with rollback capability
- Role-based permissions for editing and publishing

### **A2. Email Notification & Communication System**

The system shall enable SEC and AHS staff to manage automated email communication and notification triggers without AHFC IT support.

#### **Functional Requirements:**

##### **A2.1 Template Management – Email Editor**

- i. Edit subject lines and email body content for automated and non-automated communications.
- ii. Preview templates prior to activation and before publishing.

- iii. Support standard formatting (bold, italic, links, lists) and dynamic field insertion (application name, ID, application status).

## **A2.2 Notification Logic**

- i. Configure triggers for notifications and reminders.
- ii. Enable conditional messaging (notifications) based on application status or data, to control when notifications are sent.
- iii. Support scheduling of follow-up reminders (for incomplete applications).

## **A2.3 Notification Types**

- i. Submission confirmations
- ii. Status updates
- iii. Document requests
- iv. Messaging alerts

## **A3. Workflow & Administrative Permissions**

Enable non-technical staff to configure workflow management and administrative controls.

### **Functional Requirements:**

#### **A3.1 Approval Process Configuration**

- Define and configure workflow stages and transitions, actions to be available based on user log-in. Enable approval, denial, return, and revision actions.
- Support automatic progression based on defined criteria. Configure notifications based on workflow events.
- Allow recovery and correction of stalled or incomplete applications.

#### **A3.2 User and Team Management**

- Provide role-based permissions and team-level access control.

## **A4. Heat Pump Calculator Integration**

**Conditional request 1** - The system shall integrate external calculator functionality into a unified workflow.

### **Functional Requirements:**

- A4.1** Embed calculator within application workflow
- A4.2** Auto-populate fields from application data

**A4.3** Store calculator inputs and outputs within the system

**A4.4** Enable reporting and export of calculator data

**A4.5** Eliminate duplicate data entry and external tracking systems to meet EPA reporting goals.

#### **A5. Contractor Portal**

**Conditional request 2** – Allow for installers to upload documents on the customers behalf without seeing customers personal data. Provide notification of the action performed and track in application workflow.

## **APPENDIX B – PROPOSAL EVALUATION & SCORING CRITERIA**

### **B1. Overview**

Proposals will be evaluated by a review committee based on the criteria outlined below. The intent of this scoring framework is to ensure selection of a contractor who demonstrates a strong understanding of the project objectives, the technical capability to deliver a reliable and scalable solution, and the ability to support SEC in achieving successful program implementation.

Each proposal will be scored on a 100-point scale. Reviewers may also consider overall proposal quality, clarity, and completeness.

### **B2. Evaluation Categories and Weights**

<b>Category</b>	<b>Weight</b>
Technical Approach & Understanding	30 points
Relevant Experience & Qualifications	25 points
Team Capacity & Project Management	15 points
Cost & Value	15 points
References & Past Performance	15 points
<b>Total</b>	<b>100 points</b>

### **B3. Scoring Scale**

Each category will be scored using the following general scale:

<b>Score Range</b>	<b>Description</b>
Excellent (90 - 100%)	Fully meets or exceeds requirements; demonstrates exceptional understanding and approach
Good (70–89%)	Meets requirements with minor gaps; approach is sound and feasible
Fair (50–69%)	Partially meets requirements; gaps or risks identified
Poor (0–49%)	Does not meet requirements; significant concerns

Reviewers may assign scores within ranges based on proposal quality.

## **B4. Detailed Evaluation Criteria**

### **B4.1 Technical Approach & Understanding (30 Points)**

Proposals will be evaluated on the degree to which the offeror demonstrates a clear understanding of the JOLT platform challenges and proposes a practical, effective approach to achieving the required outcomes and affordability for the work to be achieved within our phased approach.

#### **Key considerations include:**

- Demonstrated understanding of current system limitations described in Section 2.3
- Ability to translate requirements into a stable, scalable solution
- Approach to improving:
  - Application reliability and data integrity
  - Workflow functionality and administrative control
  - User experience for applicants and staff
- Approach to enabling non-technical configurability (forms, workflows, communications)
- Strategy for integrating external tools (e.g., calculator functionality)
- Identification of risks and proposed mitigation strategies
- Ability to propose improvements beyond minimum requirements

### **B4.2 Relevant Experience & Qualifications (25 Points)**

Proposals will be evaluated based on the firm's experience delivering similar systems and services.

#### **Key considerations include:**

- Experience developing application platforms, workflow systems, or case management systems
- Experience with configurable systems for non-technical users
- Experience with document management, notifications, and workflow automation
- Experience integrating external tools or APIs
- Experience working with government, nonprofit, or grant-funded programs
- Familiarity with rural or low-bandwidth environments (preferred)

*Preference may be given to firms with demonstrated success delivering similar systems under real-world operating conditions.*

#### **B4.3 Team Capacity & Project Management (15 Points)**

Proposals will be evaluated based on the ability of the team to successfully deliver the project within the required timeline.

**Key considerations include:**

- Clarity of project management approach
- Defined roles and responsibilities of team members
- Availability and capacity to meet project timeline
- Communication approach and coordination with SEC and AHFC
- Approach to iterative development, testing, and deployment

#### **B4.4 Cost & Value (15 Points)**

Proposals will be evaluated on cost reasonableness and overall value to SEC.

**Key considerations include:**

- Clarity and transparency of cost proposal
- Alignment between cost and proposed scope/approach/phasing
- Identification of cost drivers and assumptions
- Cost efficiency relative to proposed outcomes

#### **B4.5 References & Past Performance (15 Points)**

Proposals will be evaluated based on past performance and references.

**Key considerations include:**

- Quality and relevance of previous work
- Client satisfaction and project outcomes
- Ability to deliver on schedule and within scope
- Responsiveness and communication

SEC may contact references provided and/or consider prior experience working with the offeror.

## **B5. Additional Considerations**

SEC reserves the right to consider the following in final selection:

- Overall proposal clarity, organization, and completeness
- Demonstrated ability to collaborate with multiple stakeholders
- Responsiveness during the procurement process
- Proposed innovations or enhancements beyond minimum requirements

## **B6. Interviews and Clarifications (Optional)**

SEC may, at its discretion:

- Request clarifications from offerors
- Conduct interviews or presentations
- Request revised proposals

**B7. Final Selection** - Final selection will be based on total score and overall best value to SEC, as determined by the evaluation committee.