**Exhibit 1**

**Solicitation # 1600000072**

**Software Requirements**

Bidder shall review the following items. Bid responses must disclose the features available through the bidder’s software solution by stating the solution fully meets, partially meets, or does not meet requirement. If the solution partially meets, the bid must include in narrative form how the solution meets the requirement.

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| **A. Mandatory Software Business Requirements** | | **Bidders Solution Fully Meets, Partially Meets or Does not Meet** |
| 1. | Solution must allow ODOC staff and agencies the ability to enter, modify, review energy audit data, and facilitate cloud-based storage. Within the Bidder’s software solution, staff must be able to sign electronically, upload completed electronically or manually signed forms and applications for storage or workflow to client staff to verify and process all required documentation. |  |
| 2. | Solution must allow ODOC to store and retrieve custom reporting to query in real-time or near real-time, run ad-hoc reporting, and schedule customized reports or exports of data. |  |
| 3. | Solution must allow customizable permission(s) to client’s internal end-users, to be able to customize at least one fields, hide fields, change dropdown menus, and tab order. |  |
| 4. | Solution must store changes to every field and allows queries and reportable access to that data. |  |
| 5. | Solution must offer a primary source of verification where no duplicated home files are created. Program must combine any files at time of creation and on a continued basis. |  |
| 6. | Solution must allow for the monitoring, control, and automatically updated budget as any charge is submitted for each job. This change in budget must occur in real-time or near real-time. All fields should be reportable through software’s reporting feature tools. |  |
| 7. | Solution must provide a dashboard for quick view, at both the State and agency level, of data for requested information. |  |
| 8. | Solution must provide a mobile, tablet, and computer solution for those that are outside of the office. This must also include an off-line feature. |  |
| 9. | Solution must successfully transfer existing data into new software solution. |  |
| 10. | Solution must create standardized job numbers for each home. Must also redact information for privacy reasons as needed. |  |
| 11 | Solution must automatically create a risk assessment, reminders for contractor licenses, certificates, and missing documents. |  |
| 12. | Solution must be able to produce ad-hoc reports on all data in the system. |  |
| 13. | Solution must create, update automatically, and maintain supply/inventory lists by agency. Must update in real-time or near to real-time. Agencies must be notified when a supply/inventory is getting low in availability. |  |
| 14. | Solution must allow searching by commonly used data fields, such as project number, sub grantee, address, building type, contact person, etc. In search screen(s) for projects, inspection, organization, etc. that navigates to the desired object when selected. |  |
| 15. | Must allow for the scoring and production of a prioritized client wait list that will assess several factors including: Age of occupant, energy burden, energy usage, disabilities, etc. A client’s priority number must be editable by users with administrative rights, i.e., ODOC staff. |  |

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| **B. Non-Mandatory Software Business Features** | |  |
| 1. | Data fields may be read-only, editable, amendable and/or locked based on business rules or user security. Include government wide read-only access. |  |
| 2. | Solution should allow authorized grantee and sub grantee users to create, set up and maintain grantee and sub grantee employees. |  |
| 3. | Solution should allow authorized grantees and sub grantee users to set up and maintain project contact information associated with each project, programs, project measures for project, by project type. |  |
| 4. | Solution should support multiple programs, each with different requirements, business rules, and data fields. The current program is Weatherization; however, the system must also support adding new programs as they arise. |  |
| 5. | Solution should allow for the ability to refer Weatherization clients to other programs administered by the State of Oklahoma and/or Local Agencies. |  |
| 6. | Solution should allow for building of user profiles for individuals including their certifications and recertification deadlines. |  |
| 7. | Solution should allow for ODOC to update Agency profiles/service territories as needed. |  |
| 8. | Solution should allow for de-identifying reports to ensure program data can be shared without compromising Personal Identifying Information. |  |
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| **C. Mandatory Requirements for Data Access and Security:**  The system security must limit access for sub grantee and contractors, while allowing the Grantee access to all areas of the system, based on security roles. The system must: | |  |
| 1. | Solution must integrate with Weatherization Assistant 8.9. This software will be a required system entity for sub grantees and contractors. |  |
| 2 | Partial or full integration solutions for CAPTAIN (CAP Systems, and Agate OKGrants). |  |
| 3. | Fully integrate with Microsoft Active Directory and/or Microsoft Work account for grantees to allow single sign on system access. |  |
| 4. | Provide the ability for a specific security role to allow grantee users to edit user security roles, add and approve new users, and manage SAW access requests, including the ability to approve, deny, inactivate access requests, and contractor’s entries and modifications, identifying the user and date any entry or modification made. |  |
| 5. | Enforce user-based security to ensure sub-grantee or contractor users can only view records for their organization with the exception of ODOC approved. notifications. |  |
| 6. | Auto inactivate or have a period of inactivity report for users who do not access the system for a specified amount of time. |  |
| 7. | Automatically expire registrations that are not accessed within 90 days. The system must allow reissue of registration invitations after expiration. |  |
| 8. | Keep a record of the log-in activity for all users. |  |
| 9. | Allow persons to be inactivated and system access revoked. |  |
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| **D. Mandatory Requirements for Client Eligibility and Demographics:** | |  |
| 1. | The solution must allow the entry/update of whether the client is eligible for each program (yes/no), (with the possibility of adding additional programs in the future) and date that program eligibility was verified. If not eligible, which program criteria caused the ineligibility (may be multiple). |  |
| 2. | The system will house the client Weatherization application for services. The application must be available for electronic submittal along with required documentation. Functionality will be required for clients to fill out and submit their application electronically as well as printing a paper copy. |  |
| 3. | The solution must allow for integration of mailing documents/applications to physical addresses. |  |
| 4. | Once a client is identified as ineligible for the weatherization program in the intake process, the system will prevent further process steps for that client for that program (e.g. energy audit). |  |
| 5. | The solution must identify deferrals: allow the ability to collect minimal information for how many households were deferred and the reason for the deferral using standard deferral reasons. Add, delete or update the reasons for deferrals that are available for selection. Current reasons:   * 1. The client has known health conditions that prohibit the installation of insulation and/or other weatherization materials.   2. The building structure or its mechanical systems, including electrical and plumbing, are in such a state of disrepair that they cannot be repaired reasonably.   3. The house has sewage or other sanitary problems that would further endanger the client and weatherization installers if weatherization work is performed, and repair is beyond the scope of reasonable cost justification.   4. The house has been condemned or electrical, heating, plumbing, or other equipment has been “red tagged” by local or state building officials or utilities.   5. Moisture problems are so severe that they cannot be resolved.   6. Dangerous conditions exist due to high carbon monoxide levels due to combustion appliances and cannot be reasonably resolved.   7. The client is uncooperative, abusive, or threatening to the crew, subcontractors, auditors, inspectors, or others who must work on or visit the house.   8. The extent and condition of lead-based paint in the house would potentially create further health and safety hazards were to be disturbed.   9. Discovery of Asbestos Containing Materials (ACM).   10. In the judgment of the energy auditor, conditions exist which may endanger the health and safety of the work crew or contractor.   11. Client refuses a major measure.   12. Other (with field to enter comment) |  |
| 6. | Program criteria related to eligibility for Weatherization,   * 1. Income      1. Income amount: capture annual income for all people in the household in compliance with LIHEAP Income Eligibility Guidelines (LIHEAP Policy Defining Types of Income, Exclusions and Deductions).      2. Have ability to identify eligibility criteria used by grantee for household as percentage of         + Federal poverty level (FPL)         + State median income (SMI)         + Average median income (AMI)         + FPL Percentage range – Income level of federal poverty level of recipient(s) – can be up to 200%   <75%   1. 76%-100% 2. 101%-125% 3. 126%-150% 4. 150%-200%    * + - SMI percentage range – up to 60%      1. Number of People in Household    1. System must allow the sub grantee to verify and track the following eligibility criteria related to the home.       1. Must show proof of who owns the home (must list name of person(s) on deed); an option area to upload proof/documentation of deed.    2. Proof of Citizenship, or Qualified Alien (proof of residency of some kind should be uploaded)    3. Identify if the multifamily building is a shelter, group home or similar facility with high rate of turnover among residents that documentation of individual resident eligibility is impractical. |  |
| 7. | The solution must have the ability for the Grantee to modify and retain a maintenance table that contains the Average Median Income (AMI), Federal Poverty Level (FPL), and State Median Income (SMI) data. These are amounts that are calculated outside the system and must be updated in the system annually to be used in Income calculations as identified above. The tables will contain the number of people in the family, the County, and the income amount. |  |
| 8. | The solution must be able to track demographic data (from Household Information Form): (Required =\*)   1. \*Client first name 2. \*Client last name 3. \*Client middle initial 4. \*Residence Address 5. \*Residence City 6. \*Residence State 7. \*Residence Zip Code 8. Mailing Address (if different) 9. Mailing Address City 10. Mailing Address State 11. Mailing Address Zip Code 12. Phone number 13. Message Phone Number 14. Lived at Residence (years/months) 15. \*Housing Status     * 1. Own/buy       2. Subsidized       3. Rental       4. Roomer/Boarder       5. Temp Housing 16. Property Owner (if Subsidized, rental, roomer/boarder, or temp housing require this information)     * 1. Property Owner Name       2. Property Owner Phone       3. Property Owner Email       4. Property Owner Address 17. \*Cost per month 18. \*Housing Type     * 1. Site-built Single Family       2. Manufactured Housing       3. Multi-family 2 – 4 Units       4. Multi-family 5 – 20 Units       5. Multi-family 20+ Units 19. Number of bedrooms 20. \*Income/Benefits (allow multiple selections)     * 1. SSI       2. TANF       3. GA       4. VA       5. Social Security       6. Military       7. Earned Income/Wages       8. Pension       9. Self-Employed       10. Child Support       11. Unemployment       12. Other 21. \*Total Number of People in the Household 22. \*Household’s Monthly Income 23. \*Electric Utility     * 1. Drop down list of electric utility providers 24. Gas Utility     * 1. Drop down list of gas utility providers       2. N/A 25. \*Primary Heat Source     * 1. Electric Resistance       2. Electric Heat Pump       3. Natural Gas       4. Propane       5. Oil       6. Wood       7. Coal       8. Kerosene       9. Other       10. No Heating System 26. \*Secondary Heat Source     * 1. Electric Resistance       2. Electric Heat Pump       3. Natural Gas       4. Propane       5. Oil       6. Wood       7. Coal       8. Kerosene       9. Other       10. No Heating System 27. \*Annual Heat Cost 28. \*Total Energy Cost 29. \*Total Annual Electric Costs 30. \*Household Member Information (repeat for each person in the household)     * 1. \*Last Name       2. \*First Name       3. Middle Initial       4. \*Year of birth       5. \*Relation to Primary          1. Self          2. Spouse          3. Partner          4. Child          5. Other – Relative          6. Other – Non-Relative 31. \*Gender     * 1. Male       2. Female       3. Intersex, Nonbinary       4. Not Listed \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ 32. Ethnicity     * 1. Hispanic or Latino       2. Not Hispanic or Latino 33. Race     * 1. American Indian or Alaska Native       2. Asian       3. Black or African American       4. Native Hawaiian or Other Pacific Islander       5. White       6. Multi-Race       7. Other: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ 34. Education (24 Years or Older)     * 1. Grade 0 – 8       2. Grade 9 – 12 Non-graduate       3. High School Graduate/GED       4. 12+ Some Post-Secondary       5. Associates Degree       6. Bachelor’s Degree       7. Master’s degree, PhD, JD 35. Differently Abled     * 1. Yes       2. No 36. Military Veteran     * 1. Yes       2. No 37. Health Insurance     * 1. Yes       2. No |  |
| 9. | The solution must be able to calculate the following based on demographic data entered for this client:   * 1. High Energy User (A low-income household whose annual household energy expenditure exceeds the median level of residential expenditures for all low-income households in the state).      1. Yes      2. No   2. High Energy Burden (A low-income household whose annual residential energy burden [annual household energy expenditures divided by annual household income] exceeds the median level of energy burden for all low-income households in the state).      1. Yes      2. No   3. To perform these calculations, the following fields will need to be entered and saved annually:      1. Median level of residential energy expenditures for all low- income households in the state      2. Median level of energy burden for all low-income households in the state |  |
| 10. | The solution must track the presence of client-specific conditions for Weatherization Plus Health:   * 1. Potentially medically vulnerable   2. Has Chronic Respiratory Condition, Self-Reported   3. Has a Health Condition making them vulnerable to heat and/or cold   4. Within home for 20+ hours per day   5. Other Indoor Air Quality Safety related questions as needed |  |
| 11. | The solution must use address verification software to ensure that the addresses entered are consistent. This will aid in reporting and matching projects to other reporting (LIHEAP) |  |
| 12. | The solution must have the ability to associate projects, sites and buildings to other previously weatherized projects that received Weatherization services prior. |  |
| 13. | The solution must allow for grantee-level auto generated unique identifier for each project. |  |
| 14. | The solution must document Historic Weatherization Properties:   * 1. Have the sub grantee identify whether the property is >=45 years old and whether it is historic.      1. Category Historic >=45 years with 3 choices         1. Programmatic Agreement         2. SHPO Not Historic Site         3. SHPO Historic Site   2. Be able to attach the submission to SHPO to the project and capture the date submitted to SHPO. |  |
| 15. | The solution must support multi-family projects and include:   * 1. Number of buildings   2. Number of units   3. Validate that the number of units should be less than or equal to the number of people. |  |
| 16. | System should be able to apply eligibility criteria per selected program(s). The system will track the data elements required for the eligibility criteria for each program. The system will allow the attachment of documents to support eligibility (optional, if the agency wishes to use). |  |
| 17. | The solution should track Project Number: a unique identifier assigned at the agency level (optional, if the agency wishes to use). |  |
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| **E. Mandatory Project Milestones and Work Tracking Requirements** | |  |
| 1. | Allow to enter/update milestones related to each Program associated with the project and capture completion dates for milestones. Also identify the order in which the milestones must be completed. These include:   * 1. Application Date   2. Audit scheduling   3. Energy audit date (Weatherization)   4. Job Start Date: the date work begins on the home, either crews or contractors are assigned.   5. Job Finished Date   6. Quality Control Inspection Date Completion   7. Job Closed Date: All dollars allocated   8. Client communication (will options for multiple dates throughout the process) (see #3 below) |  |
| 2. | Capture dates or verification of completion when client education is provided. (\*= Required)   * 1. \*Informed Consent prior to weatherization   2. \*Scope of work, verbal, and written agreement   3. \*Client education guide and pamphlets   4. \*After completion – what measures were installed and how to maintain |  |
| 3. | Determine (Display/Report/Searchable) Project status based on completion of specified milestones. |  |
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| **F. Mandatory Functionality Scope of Work (list of measures)** | |  |
| 1. | Allow authorized users to add the program(s) and associated planned and actual measures used for the project. |  |
| 2. | Require a minimum set of data elements before allowing a project to be saved. |  |
| 3. | Depending on the measure, track predefined aspects of a measure such as cost, amount by a defined unit of measure, fund source, etc. |  |
| 4. | Ability to calculate energy calculations to determine energy savings in comparison to measures installed. |  |
| 5. | The Grantee should be able to customize the list of measures and associate measures with specific funding sources. |  |
| 6. | Include a library of additional measures. |  |
| 7. | Provide the ability to select weatherization measures to be done for the specific date. |  |
| 8. | In the list of measures, identify fund source for each measure.   * 1. Include a validation if the measure is not allowed for that funding source.   2. Identify which fund source(s) were used for each measure |  |
| 9 | Track the costs of a project including program, owner contributions, funding sources, match dollars and utility leveraged funds. |  |
| 10. | Allow agencies to enter cost per measure (price list) based on bid sheets and annual procurement negotiations. |  |
| 11. | The system will generate a scope of work document based on the measures selected. A digital copy will be stored in the system associated with the project. Capture the date the client approved. |  |
| 12. | The client will approve the scope of work with a digital signature or allow the agency to identify if a digital signature wasn’t attainable. |  |
| 13. | Include a note section regarding measures and why not doing one. |  |
| 14. | Identify measures that could have been done but are not being done for some reason. Track reasons why a measure was not done (for example, measure costs exceed threshold). |  |
| 15. | Create a validation where the client refuses a measure. Document that the client refused if a standard measure. Add validation that certain measures cannot be refused (major measures). These major measures are:   * 1. Attic insulation (Single Family, Mobile Home, Multifamily Low-Rise, Multi-Family/High-Rise)   2. Wall insulation (Single Family, Multifamily Low-Rise, Multifamily Mid/High-Rise)   3. Floor insulation (Single Family, Mobile Home, Multifamily Low-Rise)   4. Priority air sealing   5. Blower door assisted air sealing   6. Ventilation |  |
| 16. | Weatherization Specification – for each measure identify the related SWS federal standard that applies. |  |
| 17. | Allow authorized users to add/update multiple projects in a download from the system to other systems for their use. |  |
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| **G. Mandatory Energy Modeling Requirements** | |  |
| 1. | Ability to (at least partially) integrate with the Weatherization Assistant Suite of tools, i.e., NEAT, MHEA in some capacity. In addition, must have a built – in energy modeling module (that is optional, ODOC may consider it for use in future program years, but not in the next two), OR full 100% integration with the most current Weatherization Assistant Suite of tools (NEAT/MHEA). |  |
| 2. | The energy modeling software or integration with external software must be able to evaluate all building types and characteristics, standard weatherization measures and can be customized. The software should support the ability to add, edit and delete building type, characteristics, and measures by program. |  |
| 3. | The energy modeling software must be able to show cost effectiveness of proposed measures based on savings investment ratios as defined by the Department of Energy. |  |
| 4. | Ability to modify energy modeling software or update fields for external software based on federal program requirements on an annual basis. This includes:   * 1. Weatherization measures   2. Fuel cost   3. Weather data |  |
| 5. | Software must allow Grantees to select measures Subgrantees may install without needing to run an energy model for the project (Referred to as General Heat Waste, limited to $250). |  |
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| **H. Mandatory Monitoring and Inspection Requirements** | |  |
| 1. | Associate monitoring activity and inspections to the project/job in both connected and mobile mode. |  |
| 2. | Enable the Quality Control Inspection (QCI) form and Quality Assurance Inspection Form (QAI) to be generated from the system. Project specific data entered at project setup:   * 1. Project number   2. Client name   3. Address   4. Zip Code   5. Status: Owner or Renter   6. Year built   7. Housing Type: Site Built, Mobile Home (MH), MH + Addition, Multifamily (MF) 2-4, MF 5+   8. Heating System Primary & Secondary – Natural Gas, Propane, electric, Oil, Solid Fuel, Other   9. List of Contractors   10. Auditor Name & Initial Date (Date of Audit)   11. Weatherization Application Date   12. Funding sources used   13. Recertification Application Date (as needed) (weatherization client applied but work did not start before the 1-year date. This is the date of income recertification).   14. Allow entry of the following:       + Inspector Name & Initial Date       + Inspections:         - Unit Pass QCI (Yes/No)         - QCI Name         - QCI Number & Expiration Date         - Signature (digital) and date signed         - Corrections Needed (comment section)       + If the project does not pass the inspection, then once completed an additional inspection is required – therefore additional inspection sections. |  |
| 3. | The system will identify projects that fit selected criteria in order to perform monitoring.   * 1. Select Agency number   2. Select projects where the final inspection was completed in the timeframe selected   3. Display the funding sources, and costs for the projects that fit the criteria (important to be able to select projects with DOE funding)   4. Allow the Monitor to select projects to assemble the portfolio of projects to be reviewed.   5. Allow the Monitor to enter notes about sub grantees and individual projects. |  |
| 4. | Allow Monitor to communicate with sub grantee selected or provide a report to be emailed to sub grantee identifying the projects to be reviewed and the timing of the visit. |  |
| 5. | Allow upload of documents related to sub grantee and specific projects. Ensure the attachments are secure, and that the file capacity is sufficient. |  |
| 6. | Allow authorized users to attach supporting documentation to an inspection in various common file formats such as Word, PDF, PNG, JPEG, TPGX or Excel Formats. System must not allow executable file formats such as but not limited to EXE or macro-enabled Excel files. |  |
| 7. | Allow monitors to review project scope of work, diagnostic testing data and pictures |  |
| 8. | Incorporate the sub grantee annual work plan as an electronic form. Includes targeted projects by quarter that will be used during reporting. |  |
| 9. | Incorporate Annual Monitoring Questionnaire as electronic form. |  |
| 10. | Allow the attachment of policy documents at an agency level. These include:   * 1. Procurement policy   2. Training needs   3. Dispute resolution form   4. Inventory plan   5. Agency Owner/Agency Agreement   6. Agency Outreach plan   7. Cost Allocation Plan   8. Include a field for the date last updated. Include a date for each policy stating when it was last verified that it is current. |  |
| 11. | Incorporate Pre-Monitoring checklist as an electronic form. This includes the fiscal checklist. |  |
| 12. | Incorporate the Monitoring Report checklist as an electronic form. This includes the following sections:   * 1. Program review   2. Technical review   3. Financial management review   4. Incorporate all reviews as electronic, enabling each reviewer to view, comment, and approve or request changes. |  |
| 13. | Incorporate the Inspection Report as part of the overall Monitoring Report. There would be an Inspection report for each project reviewed. Use the Agency’s QCI checklist as an electronic form to document the monitor’s findings. Have one QCI that the agency uses and is used for monitoring. Inspector checks the audit form also to ensure that the correct measures were completed. Document that it was reviewed what was done and agree. |  |
| 14. | As part of the QCI process track corrections, and subsequent re-review. |  |
| 15. | Incorporate the ability to identify the specification related to corrective action identified. |  |
| 16. | Incorporate workflow and tracking for required approvals of completed Monitoring Reports. |  |
| 17. | Capture responses from Agency, and any continuing communication regarding completed monitoring report. |  |
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| **I. Mandatory Reporting Functions:** The reporting functions must allow for formatted (canned) and raw data extracts in a variety of export formats to include excel, pdf, csv depending on the report. The system must capture the data necessary for the formal reporting needs. The system must be able to run ad-hoc reporting, and schedule customized reports or exports of data. | |  |
| 1. | LIHEAP Reporting Requirements:   * 1. Total Units Weatherize   2. Number of Assisted Households   3. Poverty Levels:      1. Under 75%      2. 76% to 100%      3. 101 to 125%      4. 126% to 150%      5. Over 150%   4. Number of vulnerable households/units   5. 60 years or older   6. Disabled   7. Age 5 years or younger  1. Average Household Benefit 2. Maximum Annual Dollar Income for 4-Person Household   Individual Household Reports:   1. LIHEAP Identification Number 2. Referral Method    1. DHS Direct Referral/Not on LIHEAP List    2. DHS Direct Referral/On LIHEAP List    3. Agency Marketing/Word of Mouth/Not on LIHEAP List    4. Agency Marketing/Word of Mouth/On LIHEAP List    5. Self-Certification (Yes/No)    6. Quarterly Report Period & Program Year    7. # of Children Under age of 2 in Household    8. # of Children between ages 3-5 in Household    9. # of Children under 21 in Household    10. # of Native American in Household    11. # of Differently Abled in Household    12. # of Person 65 Years and Older    13. Total number of persons in the Household    14. Date Unit Complete    15. Total LIHEAP Cost Spent on Unit    16. Did LIHEAP WX include repair or replacement due to INOPERABLE equipment? (Yes/No)    17. Did LIHEAP WX include repair or replacement due to ENERGY INEFFICIENT equipment? (Yes/No)    18. Equipment Repair/Replace Cost ($ whole dollar amount) 3. \*If xv. or xvi. are marked Yes, then xvii is a required field |  |
| 2. | DOE Quarterly reporting   * 1. Units by Type      1. Owner-Occupied Single Family      2. Renter-Occupied Single Family      3. Owner-Occupied 2-4 units per building      4. Renter-Occupied 2-4 units per building      5. Multifamily, 5 or more units per building      6. Owner-Occupied Mobile Home      7. Renter-Occupied Mobile Home      8. Shelter   2. Units by Primary Heating Fuel      1. Natural Gas      2. Fuel Oil      3. Electricity      4. Propane/LPG      5. Kerosene      6. Wood      7. Other Fuel      8. No Heating System   3. Units by Occupancy      1. Elderly-Occupied      2. Differently Abled-Occupied      3. Native American-Occupied      4. Children-Occupied      5. High Residential Energy User      6. Household with High Energy Burden   4. Re-weatherized Total   5. Total People Assisted with Grant Funds      1. Elderly (60+)      2. Differently Abled Persons      3. Native American      4. Children (<= 19)   f. Leveraged Units (units completed with other funds) |  |
| 3. | DOE Annual Historic Preservation Report   * 1. Total number of activities being funded in whole or in part with DOE funds   2. Number of activities that were exempt from further historic preservation review under the PA due to property age   3. Number of activities exempt from further historic preservation review per the PA list of exempt activities   4. Number of activities exempt from further historic preservation review under the PA due to a prior review under a Section 106 agreement for Community Development Block Grants (CDBG)   5. For any activities that you did not identify as exempt from further review, identify the number of Section 106 reviews completed under the PA. |  |
| 4. | DOE – Monitoring, Training and Technical Assistance and Leveraging Report  Programmatic, Fiscal, & Administrative Monitoring Activities section of the report:   1. Grantee/Agency 2. Type of Monitoring 3. Monitoring Dates   DOE Program Year  Grantee Staff Assigned   1. Number of Findings/Discrepancies/Corrections and what they were   Risk Assessment Score of Agency  Technical, Quality Assurance Monitoring Activities section of the report –   1. Grantee/Agency 2. Type of Monitoring 3. % of QAs Required to be Completed 4. # of Units Completed from 4/1/XX to 3/31/XX 5. Minimum QAs Required (up to 2 decimal places) 6. Total # of QA Inspections Completed   Total # of Energy Audit In-Progress Inspections Completed  Total # of Health and Safety In-Progress Inspections Completed  Grantee Staff Assigned   1. Number of Findings/Discrepancies/Corrections and what they were |  |
| 5. | The reporting functions must allow for formatted (canned) and raw data extracts in a variety of export formats to include excel, pdf, csv depending on the report. |  |
| 6. | Must create reports based on energy modeling software that can demonstrate cost effectiveness of proposed measures based on savings investment ratios. |  |
| 7. | Must create aging reports showing progression of project milestones. |  |
| 8. | Must track funding source(s), demographics, project measures, contractor, measure and funding amount and funding used for each project. |  |
| 9. | Must present comparison of planned vs. actual measure installations by project. E.g., Change Orders. |  |
| 10. | Must pull raw data extracts from system and create custom queries. |  |
| 11. | Must allow sub grantee to track estimated project production for all programs and pull reports on projected targets vs. actuals. |  |
| 12. | Must create customized summary reports to meet federal reporting needs. |  |
| 13. | Must work with contractor to create customized reports or modify reports already created as needed to meet Federal or State requirements or needs. |  |
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| **J. Financial and Inventory** | |  |
| 1. | Must allow for rules to be applied to individual funding sources as needed |  |
| 2. | Must allow for an integrated inventory management capability |  |
| 3. | Must allow for Agencies to update their labor and materials cost with the approval of ODOC |  |
| 4. | Must track equipment and vehicles including depreciation and amortization capabilities |  |
| 5. | Must pull data from scanned receipt or other financial documents. |  |
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| **K. Audit Trail** | |  |
| 1. | Must keep a log of actions on the organizations’ modifications to each project. |  |
| 2. | Must allow monitoring team to send email transmissions to organizations which also will log transmission event. |  |
| 3. | Must lock projects once they are deemed complete and functionality to only unlock by a system administrator i.e., ODOC user. |  |
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| **L. Data Migration** | |  |
| 1. | Supplier must develop a migration strategy to ensure legacy data can be properly: analyzed, profiled, extracted, transformed, cleansed, and loaded into the new system. |  |
| 2. | Supplier must provide a gap analysis to inventory data assets and new associated fields to provide schema matching/mapping. |  |
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| **M. Testing and Training** | |  |
| 1. | Supplier must provide a test environment for data migration, system testing and user acceptance testing to ensure quality and data resiliency. |  |
| 2. | Supplier must provide test plans, scenarios and expected results. |  |
| 3. | Supplier must provide training and documentation. |  |
|  |  |  |
| **N. Accessibility** | |  |
| 1. | System must meet or exceed the Web Accessibility Policy set forth by the Oklahoma Information Technology Consolidation and Coordination Act, OMES-Information Services |  |
|  |  |  |
| **O. Public Disclosure** | |  |
| 1. | All data input into the system must remain the property of the grantee. |  |
| 2. | All data must be searchable and extractable for public disclosure requests. |  |