PRE-OFFER CONFERENCE
September 25, 2013
9:00 a.m. – 11:00 a.m. HST

REQUESTS FOR PROPOSALS

RFP No. 13-016-SW

Enterprise Resource Planning (ERP) Solution

State of Hawaii

Office of Information Management and Technology

Presenters:

Donn Tsuruda-Kashiwabara, State Procurement Office (SPO)
Randy Baldemor Office of Information Technology (OIMT)
Rosy Spraker, Gartner for OIMT
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Agenda

- Introduction/Opening Remarks
- Significant Dates
- Overview of the RFP Process
- Background and Business Goals
- Overview of the Scope of Work
- Two-Stage Contract
- Guiding Objectives
- Evaluation Criteria
- Structure of the RFP/Structure of Offers
- Offeror's Library and NDA
- HIePRO
- HCE

CITRIX | online

Introduction

- State Procurement Office (SPO) on behalf of Office of Information Management Technology (OIMT) conducting procurement.
- RFP issued pursuant to Hawaii Revised Statutes (HRS) Section 103D-303 and Hawaii Administrative Rules (HAR) Title, 3 Subtitle, 11, Chapter 122, Subchapter 6.

State Procurement Officer/State Point of Contact

- State Procurement Officer is Aaron Fujioka. Contact information located in Section 16.7.
- State POC is Donna (Donn) Tsuruda-Kashiwabara. Contact information located in Section 4.2 in RFP document.
- All inquiries/questions shall be submitted through HIePRO.

Definitions

- Prospective Offeror – A vendor that has registered in HIePRO and has submitted an NDA.
- Priority-listed Offeror – Offeror whose proposal is determined acceptable or potentially acceptable.
- Offeror – Any individual, partnership, firm, corporation, joint venture or other legal entity, which has submitted an Offer.
- Contractor
  - Fit-Gap Contractor - Offeror selected to provide the Fit-Gap Services.
  - ERP Solution Contractor – Fit-Gap Contractor selected to provide ERP Solution Services.

SIGNIFICANT RFP DUE DATES	
For a complete listing of the Significant RFP Dues Dates, see Section 9.1 in the main RFP document located in HIeRPO.	
Due date/time to Submit Questions – Initial Round*	**October 7, 2013, 12:00 pm. (HST)**
Due date/time - State's Response to Questions – Initial Round*	**October 14, 2013, 4:30 pm. (HST)**
Due date/time to Submit Questions – Second Round*	**October 21, 2013, 12:00 p.m. (HST)**
Due date/time - State's Response to Questions – Second Round*	**November 4, 2013, 4:30 pm. (HST)**
Deadline to Submit Letter of Intent	**November 19, 2013**
Deadline for Submission of Offers	**December 3, 2013, 2:00 p.m. (HST)**
Discussion with Priority Listed Offerors (if necessary)	**To be scheduled as necessary**
Best and Final Offer (BAFO)*	**To be scheduled as necessary**
*Submittal of questions, response to questions and proposals shall be received through the Hawaii State eProcurement System, (HIePRO) by date and time indicated above. Proposals submitted after the deadline and/or not through HIePRO shall not be considered for award.	

Overview of the RFP Process

- Issuance of RFP. All changes to be made through addenda.
- All questions, responses to questions and proposals shall be received on HIePRO.
- Evaluation based on the evaluation criteria set forth in the RFP. Review conducted by committee of at least three government employees.
- If discussions are necessary, a priority-list shall be generated consisting of acceptable or potentially acceptable proposals.
- Addenda shall be issued inviting priority-listed offerors to submit BAFO.
- BAFO shall be scored on criteria set forth in the RFP.
- Award shall be made to the Offeror whose proposal is scored the highest.
- Request for debriefing by non-selected offerors shall be submitted to the Procurement Office within three (3) working days after award is made.
- A protest may be filed within five (5) working days after award is made or after completion of debriefing.
- All non-confidential records are available for public inspection after award is made.

Background and Business Goals

- Establish a reliable technical foundation that accommodates changes.
- Enable consistent adoption and application of policies and procedures.
- Increase efficiency to improve State services.
- Increase the capabilities of the Hawaii workforce and optimize services.
- Increase accuracy and timeliness of financial, personnel and acquisition information.
- Protect the privacy and security of personal information.
- Facilitate open and transparent State government operations.
- Create a work environment that makes us the employer of choice for Hawaii.
- Prioritize technology decisions based on State-wide business benefit.
- Establish core functionality that delivers the greatest business benefit.
- Provide an ERP Solution that minimizes risk and maximizes benefits.
- Implement and operate an ERP Solution that reduces organizational disruption and impact.

Overview of Scope of Work

- ERP System
  - Functional Requirements – HR/Payroll, Finance/Acquisition, Budget, and other Optional Functionality
  - Technical Requirements
- ERP Services
  - Fit-Gap Services Requirements
  - Implementations Services Requirements
  - Ongoing Services
    - Hosting Services
      - State-Hosted
      - Offeror-Hosted
      - Software-as-a-Service ("SaaS")
    - Maintenance and Operations ("M&O") Services
    - Transition Services
    - Business Process Outsourcing ("BPO") Services
    - Project Team Facilities

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Two-Stage Contract

- Evaluation based on entire Scope of Work for both Stages
- Request for Offers: Each Offeror must submit a single Offer covering the ERP System, the Fit-Gap Services, and the ERP Solution Services
  - Stage 1: Fit-Gap Services – Two potential Fit-Gap Contractors
    - Scope includes Fit-Gap for all Functionality, Sandbox Environment and Project Team Facilities for Fit-Gap
    - Initial Term of the Contract is one (1) year
- Invitation for Submittals: The two Fit-Gap Contractors must provide a response based on supplemental information requested
  - Stage 2: ERP Solution Services – One ERP Solution Services Contractor
    - Scope includes Optional Software, Hardware, Implementation Services and Ongoing Services
    - Contract Options to extend for a total of six (6) years.
- Pricing Model
  - Firm-Fixed Pricing (FFP) for software, hardware, and services based on Composite Rates
  - Potential Time and Materials (T&M) Pricing for Transition Services and/or Unanticipated Tasks

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Guiding Objectives

- Phased Implementation Objective
- Functionality Deployment Objective
- Hosting Services Objectives
- Knowledge Transfer Objective
- Enhanced End-User Training Objective
- Business Process Reengineering Objective
- Organizational Change Management Objective
- Relationship Management Objective
- Data Cleansing and Conversion Objective
- Continuity of Contractor Personnel Objective

Evaluation Criteria

Evaluation Points	Evaluation Category	Evaluation Subcategory
200	Offeror Qualifications	Offeror References
		Offeror Background and Experience (and Financials)
200	Project Organization and Staffing	Project Organization
		Staff Experience and References
350	Business Solution	Functional
		Technical
		Fit-Gap and Implementation Services
		Ongoing Services
50	Contract Risk and Offeror Exceptions	RFP Exceptions and Offeror Assumptions
200	Cost	Total Cost
1,000	**Total**	

Structure of the RFP

- Primary RFP Document
- Exhibit 1 Procedures for Submitting an Offer
- Exhibit 2 Offeror's Library Instructions
- Exhibit 3 Relationship Management
- Exhibit 4 General Provisions for Goods and Services dated July 2013
- Exhibit 5 State Attorney General (AG) General Conditions
- Exhibit 6 Selected Supplemental Conditions
- Exhibit 7 Performance Bond for Supplemental Agreement for Goods and Services
- Exhibit 8 Contractor Acknowledgment
- Exhibit 9 Performance Bond (Surety) for Supplemental Agreement for Goods and Services
- Exhibit 10 Surety Acknowledgement

Structure of the RFP

- Appendix A Offeror Response Form
- Appendix B Offeror Response Form Attachments
- Appendix C-1 Hire to Retire Requirements
- Appendix C-2 Record to Report Budget Requirements
- Appendix C-3 Record to Report Financial Requirements
- Appendix C-4 Requisition to Check Requirements
- Appendix C-5 Future Functionality Requirements
- Appendix C-6 FAST Requirements
- Appendix D Technical Requirements
- Appendix E-1 Fit-Gap Services Requirements
- Appendix E-2 Implementation Services Requirements
- Appendix E-3 Ongoing Services Requirements
- Appendix F Service Level Agreement Requirements
- Appendix G Current Reports
- Appendix H Interface Requirements
- Appendix I Number of End Users
- Appendix J Volumes and Data Conversion Estimates
- Appendix K-1 Current Environment
- Appendix K-2 Future Environment
- Appendix L Proposed Project Organization and Staffing
- Appendix M Cost Workbook
- Appendix N Proposed Project Timeline and Considerations
- Appendix O Deliverable Expectation Document Template

Include Forms in Offer

Structure of Offers

- Section 1.0: Offer Transmittal Letter
- Section 2.0: Offer Form OF-1
- Section 3.0: Executive Summary
- Section 4.0: Administrative Requirements Response
- Section 5.0: Offeror Qualifications
- Section 6.0: Business Solution
- Section 7.0: Certification
- Section 8.0: Confidential Information
- Section 9.0: Cost
- Section 10.0: Offer Checklist
- Attachments: (See Offer Checklist in Appendix A)

Appendix A: Offer Form

Offeror's Library and NDA

- Used by the State to make available to Prospective Offerors technical and supplemental background information.
- Use of the Offeror's Library is Mandatory.
- A signed Confidentiality and Nondisclosure Agreement (NDA) is required to gain access (see Exhibit 2, Attachment A).
  - E-mail signed NDA to State POC.
  - Within five (5) Business Days of receiving the confirmation email from the State, the vendor shall submit the original version of the NDA with an original ink signature of the vendor by mailing the original version to the mailing address for the State POC.

HIePRO - Pronounced [hi-pro]

Where and How to Register

- http://HIePRO.hawaii.gov
- Vendor Registration Video
- Vendor Registration Guide
  - Page 5: Troubleshooting Guide
- Registration is a two step process
  - Create ehawaii.gov account
  - Login and Register as a Vendor
    - You will need your FEIN.
    - Be sure to use the **legal business name** (the award may only be awarded to the Vendor submitting the offer).
    - You must have the authority to submit offers for the business.
- Note: HIePRO does allow multiple people from the same company to register with a unique email address; Email is the User ID

HIePRO

The Vendor Commodity Code Profile

(NIGP Commodity Code Profile)

- **Primary purpose**: Convenience for vendors
  - Email notifications sent.
  - Vendor will see a list of solicitations on their Vendor Dashboard instead of all solicitations.
- Not having the commodity code in your profile does NOT prevent a vendor from responding.
  - Note: Responding to a solicitation does **NOT** add the commodity code to your Vendor Profile automatically. Add it if interested.
- Selecting NIGP Commodity Codes
  - Type in keywords associated with your Industry.
  - Select commodity code from menu, click Add.
  - Can select all, then scroll down and unselect the codes that do not apply. Can update your commodity code profile at any time.

HIePRO **Fees**

- Register in HIePRO – no fee
- Submit an offer (proposal) – no fee
- Transaction Fee to Vendor Awarded –
  - Fee of .75% (.0075) of the amount award
  - Capped at $5,000 per award to a Vendor
    - If Award= $1,000 fee= $7.50
    - If Award= $10,000 fee= $75
    - If Award= $100,000 fee= $750
    - If Award= $1,000,000 fee= $5,000
- Paid to HIePRO application provider, Hawaii Information Consortium, LLC (Not to the State)

HIePRO **Submittal Information**

- You may change your response in HIePRO as many times as you like before submittal due date and time.
  - Edit old; Submit new; Verify! (make sure you get a pop-up when you submit; log in again to make sure everything is correct (attachments, etc.) you should also get an email.
- **Offerors shall input $1.00 as the *Unit Price in US Dollars and Cents* when submitting their offer in HIePRO.**
- Proposals shall be submitted as attachments on HIePRO.
- Files in PDF format should be compatible with Adobe reader version 9 or greater.
- If your files are large (over 10MB in size), split them into smaller files.
- Include the RFP number and Offeror name in the file name.
- Proprietary information shall be contained in a separate file that is clearly identified as proprietary/confidential.
- On the Offer Form OF-1, ink signatures are not required for electronic submission of offer on HIePRO but shall be required upon Notice of Award.
- Do not wait until the last minute to submit! Once submittal deadline has passed, you will not be able to enter or change anything. The **Submit Offer** button must be pressed to be considered. Make sure your offer is **submitted,** not just saved. Check your Vendor Dashboard.
- If the submittal deadline is 4:30 PM and you are in the process of responding at 4:30 PM but have not **submitted** (pressed the submit button); you will not be able to submit once the deadline has passed.

HIePRO **Hints**

- Note the instructions for entering pricing in HIePRO are unique to this solicitation. If you respond to other solicitations on HIePRO you will be expected to enter pricing differently.
- If a response or price submitted does not include all the requirements, it is not responsive. If not sure if something is required ask the Buyer. Recommend using the Q&A in HIePRO.
- Need help registering on HIePRO?
  - Call HIePRO Vendor Liaison: Hawaii Information Consortium, LLC at 808-695-4620.
- Questions specific to this solicitation or on policy regarding HIePRO
  - Contact HIePRO Buyer for this solicitation: Donn Tsuruda-Kashiwabara at 808-586-0565.
- Got general questions about HIePRO?
  - Email: HIePRO@hawaii.gov; or
  - Call 808-586-0554.

Hawaii Compliance Express (HCE)

- HCE is utilized to verify vendor compliance with Hawaii laws to conduct business in the State of Hawaii.
- It is HIGHLY recommended to register as soon as possible. Registration is $12.00 and can easily be completed at https://vendors.ehawaii.gov.
- Award(s) will not be made to a non-compliant Offeror.

QUESTIONS?

Additional Information for Vendors

- General information for vendors may be obtained at: http://hawaii.gov/spo. Click on *Doing Business With the State*.
- Copy of today's PowerPoint is available at: http://hawaii.gov/spo/training/informational-sessions-for-vendors-contractors-and-service-providers. Select **RFP No. 13-009-SW ENTERPRISE RESOURCE PLANNING (ERP) SOLUTION.**
- All questions shall be submitted through HIePRO.

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