



## Employees' Retirement System of the State of Hawai'i.

RELEASE DATE:  
04/24/2023

### Request for Quote, (RFQ) State of Hawai'i eProcurement, (HiePRO) RFQ#23002274, ERS Project#ERSP-015 SEALED COMPETITIVE OFFERS for Board of Trustees Election Services 2023 for Employees' Retirement System

This solicitation is governed under the authority of State of Hawaii HRS 103D and is an electronic solicitation. Offered thru State of Hawaii eProcurement website, HiePRO ([hiepro.ehawaii.gov](http://hiepro.ehawaii.gov)). All offers are to be received in HiePRO by 2:00 PM HST on 05/15/2023 to be considered by the State, no hardcopies will be considered.

Employees' Retirement System is sourcing a qualified vendor to provide expert services for providing an Election Process for the ERS Board of Trustees per Hawaii Administrative Rules, Title 6 - DBF - Department of Budget & Finance, Chapter 24 - Election of members and retirant of the System to the Board of Trustees.

For Offers to be considered for award, Offerors are to be duly registered to do business in the State of Hawaii via DCCA registration, ([cca.hawaii.gov/resources](http://cca.hawaii.gov/resources)) and to be compliant in Hawaii Compliance Express ([vendors.ehawaii.gov/hce](http://vendors.ehawaii.gov/hce)) by the date and time of RFQ closure.

This solicitation is accepting Vendor questions. Questions are to be submitted in the HiePRO solicitation questions section by 05/05/2023 by 2:00 PM HST, question responses are to be provided by 05/12/2023 at 4:00 pm HST

The point of contact for this RFQ is Steven Melendrez, Procurement & Inventory Management Section, [steven.melendrez@hawaii.gov](mailto:steven.melendrez@hawaii.gov), cc [dbf.ers.procure@hawaii.gov](mailto:dbf.ers.procure@hawaii.gov).  
**Amendment # 1 is incorporated herein, 4/28/2023.**

**Mr. Thomas Williams, Procurement Officer**  
**Executive Director**



**HIePRO REQUEST FOR QUOTATION (RFQ) 23002274  
Board of Trustees Election Services 2023**

**NOTICE TO OFFERORS**

This RFQ # Q23002274, is governed by the requirements as stated in the STATE OF HAWAII website HIePRO (<https://hiepro.ehawaii.gov/solicitation>) and is authorized under State of Hawaii HRS 103D and the State Procurement Office.

ERS is soliciting to contract an expert election services company for processing an election in behalf of the Board of Trustees of the Employees' Retirement System, pursuant to Section 88-24, Hawai'i Revised Statutes, and Hawaii Administrative Rules Title 6 - DBF - Department of Budget & Finance, Chapter 24 - Election of members and retirant of the System to the Board of Trustees for (1) one general employee seat on the Board of Trustees.

In order for Offeror's to this solicitation to be considered for award, Offerors' are to be duly registered to do business in the State of Hawaii via DCCA registration, ([cca.hawaii.gov/resources/](http://cca.hawaii.gov/resources/)) and to be compliant in Hawaii Compliance Express ([vendors.ehawaii.gov/hce](http://vendors.ehawaii.gov/hce)) by the date and time of the closure of this RFQ.

Offerors' are to respond to this solicitation electronically via HIePRO RFQ # Q23002274 whereas their proposal with the Offer forms are to be uploaded into HIePRO and their quote for services to be provided in the quote Offer Form and in the Offer section of this solicitation in HIePRO.

The competitive pricing quote is to be fully encumbered, firm and fixed, lump sum inclusive of all labor, product, taxes and fees including all costs in or associated with the performance of the services rendered as described by this RFQ.

**EMPLOYEES' RETIREMENT SYSTEM, OF THE STATE OF HAWAII  
HIePRO REQUEST FOR QUOTATION (RFQ) 23002274**

**CONTRACTOR SERVICES  
SUMMARY**

**Description:** The Board of Trustees of the Employees' Retirement System of the State of Hawaii ("ERS Board") is searching for a candidate to fill one (1) general employee seat on the ERS Board. This Request for Quotation is to obtain a contractor to provide expert election services and the election process for ERS.

**Work hours:** The ERS's standard work hours are from 7:45 AM to 4:30 PM, Hawaii Standard Time. Monday through Friday, except State Holiday and/or days when work is not officially scheduled. Employees' Retirement System is located at 201 Merchant Street, Suite 1400, Honolulu, HI 96813.

**Vendor Compliance:** Vendors are required compliant with Hawaii Compliance Express ([vendors.ehawaii.gov/hce](http://vendors.ehawaii.gov/hce)) and duly registered to do business with the State of Hawaii via DCCA registration, ([cca.hawaii.gov/resources](http://cca.hawaii.gov/resources)) by the date & time of the closing of this RFQ which is 05/15/2023 @ 2:00 PM HST. Governing documents are Hawaii Revised Statutes (HRS) §103D-310(c) and Hawaii Administrative Rules (HAR) §3-122-112).

**Offeror's Submission of Documents:** This solicitation is an E-Procurement offering, provided by the State of Hawaii eProcurement System ([hiepro.ehawaii.gov](http://hiepro.ehawaii.gov)). Offeror's proposal, quote and attachment documents are to be provided and uploaded by the Offeror into the HIePRO System before the end of the solicitation period, which is 05/15/2023 @ 2:00 PM HST, (no hardcopies shall be accepted).

**Contact Person:** The point of contact for this solicitation is **Mr. Steven Melendrez, PMO**, Procurement and Inventory Management Section, ([steven.melendrez@hawaii.gov](mailto:steven.melendrez@hawaii.gov) & cc to: [dbf.ers.procure@hawaii.gov](mailto:dbf.ers.procure@hawaii.gov)). Questions in regards to the RFQ specifications are to be submitted through HIePRO, Q & A section of the RFQ, by 05/05/2023 2:00 PM HST and response provided 05/12/2023 at 4:00 PM.

**Award Method:** A standard State of Hawaii/ERS purchase order will be issued to the awardee of this solicitation.

**HIePRO REQUEST FOR QUOTATION (RFQ) 23002274  
Board of Trustees Election Services 2023**

**ADMINISTRATIVE OVERVIEW**

**1. DESCRIPTION**

The Department of Budget and Finance (B&F) , Employees’ Retirement System (ERS) of the State of Hawaii (ERS) administers a defined benefit retirement plan for the State and county government employees of the State of Hawaii. ERS provides retirement, disability and death benefits for its members. ERS is a qualified defined benefit public pension plan under Section 401(a) of the Internal Revenue Code. Administration of the ERS falls under the policy and executive direction of the Board of Trustees with certain areas of administrative control vested in the state Department of Budget and Finance.

The ERS provides retirement, disability, survivor, and other benefits to over 135,000 members. ERS membership is comprised of retirees, beneficiaries, inactive vested members and active public employees working for the State & Counties of Hawaii

**2. RFQ SCHEDULE AND SIGNIFICANT DATES**

The schedule represents the State’s best estimate of the time table that will be followed in the procurement process. All times indicated are Hawaii Standard Time (HST). If a component of the schedule is delayed, the remainder of the schedule may be delayed by the same number of days. Any change to the Schedule or significant dates shall be reflected in and issued in an addendum posted in HIePRO. The estimated time table is as follows:

<b>PROCUREMENT TIMETABLE</b>	
Release of Request for Quotes	04/24/2023
Due date to Submit Questions	05/05/2023 2:00
State’s Response to Questions*	05/12/2023 4:00
Offers Due date/time	05/15/2023 2:00
Contract Start Date	06/01/2023
Contract End Date	03/29/2024

**3. SERVICE LOCATION:**

The Awardee shall be supporting the Employees’ Retirement System (ERS) of the State of Hawaii offices for which are located at the City Financial Center, 201 Merchant Street, Suite 1400, Honolulu, Hawaii, 96813, Telephone # 808-586-1776.

**HIePRO REQUEST FOR QUOTATION (RFQ) 23002274**  
**Board of Trustees Election Services 2023**

**SCOPE OF SERVICES**

**1. INTRODUCTION**

Awardee will provide all labor, materials, equipment and supervision to complete election services as described herein necessary to fill (1) one seat on the Board of Trustees. The seat on the board is for a general employee.

All services and expenses to complete the election shall be the responsibility of the Awardee unless otherwise specified herein. The Contractor shall provide the complete services as specified. The Contractor's obligations with respect to the retention or return of records, ballots and information, and the Contractor's obligation to ensure the confidentiality of member and retirant information shall survive the termination of the contract.

**2. GENERAL SPECIFICATIONS**

The Awardee upon Purchase Order Receipt or Notice to Proceed (NTP) shall meet with the ERS to review and discuss the compliance requirements, to perform and process per the terms and specifications of this RFQ

A-1

The Awardee shall prepare and mail approximately **130,000** ballots to be distributed by the United States Postal Service to each eligible voter at the address of record with the ERS. It is anticipated, based on experience, that approximately 36% of the ballots mailed will be returned; however, ERS does not guarantee a certain percentage of returns. The Awardee shall open and tally returned ballots under the supervision of the ERS Election Committee.

**3. AWARDEE'S RESPONSIBILITIES**

1. The Awardee shall within five (5) calendar days from the date of the Notice to Proceed or receipt of the Purchase Order shall submit to the ERS Election Committee a Gantt type schedule with the Project Plan Process of activities, including but not be limited to those activities listed below.

- A-1**
2. Print **130,000** sets of: ballots, voting instructions, candidate information sheets, mailing envelopes and return envelopes. The Contractor will pay the actual cost of printing items in this paragraph. Refer to Attachment SAMPLE BALLOT for the sample ballot, voting instructions and candidate information sheets. See Attachment ENVELOPE SAMPLE for sample envelope. In printing the envelopes for ballot packets and the return envelopes, Contractor will ensure that the lowest postage rate possible can be used.
  3. Assemble and mail the documents described above to ERS members and retirants at the addresses provided by the ERS. Contractor shall mail the above documents from Honolulu per Election Timetable at the pre-sorted first class rates. The ERS will provide a CD Rom with the addresses of eligible voters at close of business per election Timetable. The ERS will pay the actual cost of postage for mailing the above documents. Awardee shall make the appropriate arrangements with the United States Postal Service (Hawaii) for payment of the postage fees directly from the ERS account. The ERS will pay return envelope postage through the Business Reply Account (BRAHMAS) system and any United States Postal Service business reply mail accounting fees.
  4. Maintain procedures to ensure the integrity of the election, including, without limitation, procedures to insure: that ballots are accounted for and not tampered with; that ballots are sent only to the members and retirants whose names and addresses are provided to Awardee by the ERS; that multiple ballots are not distributed except as provided by Chapter 6-24-7, Hawaii Administrative Rules (HAR), and that the results of the ballot count are accurate.
  5. Awardee will maintain a listing of the names and addresses of the ERS members and retirants to whom ballots have been sent.
  6. Awardee may maintain a Honolulu post office box to which ballots may be returned or ballots may be returned to the contractor's office located in Hawaii. If the post office box is used, it shall be maintained from through-out the election season as required by Chapter 6-24-5, HAR.
  7. Collect from the post office box or Awardee office and from the ERS ballots that have been returned, and segregate and store the ballots as required by Chapter 6-24-6, HAR.
  8. Maintain a daily record of the number of ballots received as required by Chapter 6-24-6, HAR.
  9. Issue new ballots in accordance with Chapter 6-24-7 (HAR) and maintain the records required by that section. The ERS will reimburse the Contractor for the cost of first-class postage for mailing new ballots.
  10. Verify that returned ballots have been returned within the prescribed period required by Chapter 6-24-6, HAR. ERS would like to have return service requested to obtain new addresses. Contractor shall prepare a list of returned mail and track mail in a log. Returns must include the unique identifier that will be provided by the ERS.

11. Awardee to log and track returned mail using the unique identifier for each member:
- a) Returned mail with forwarding address from post office:
    - 1) Log forwarding address in file provided by ERS.
    - 2) Mail ballot to new address
  - b) Returned mail with no forwarding address:
    - 1) Log in file provided by ERS
    - 2) Provide to ERS file of returned mail that is unable to be forwarded and original mail.
    - 3) **Conduct research of address and provide ERS procedures for handling returned mail with no forwarding addresses so offeror can mail new ballot to new address found (if any), etc.**
- A-1
12. ERS shall provide a unique identifier that is applicable to each person receiving the election ballot mailing as part of the address file. This unique identifier is to be printed on every address label.
13. On a date to be mutually agreed to by the Awardee and ERS to open and tally all ballots that have been returned within the prescribed period required by Chapter 6-24-9, HAR. Awardee to have the appropriate procedures to guarantee that all returned ballots can be verified and tallied. Remain anonymous, are accounted for, secured and cannot be tampered with in any way. Ballots to be opened and tallied under the supervision of the Election Committee representative at a location agreed by the Awardee and by the ERS.
14. Promptly, and, in any event, no later than noted on Timetable and certify election results to the Election Committee and deliver all tallied ballots to the ERS in a secure manner.
15. Contractor is responsible to hold tallied ballots for a period of a minimum of thirty days following the successful candidate taking office as required by Chapter 6-24-11, HAR.
16. The Contractor to ensure that all member and retirant information will remain confidential, that ERS' mailing lists will be returned, and that none of the information provided to Contractor will be sold or otherwise transferred to any 3rd party.
17. Comply in all respects with the provisions of Chapter 6-24, HAR.
18. Certify that the Awardee is an independent and uninterested party with regard to the results of the election.
19. Awardee shall complete, sign and submit the attached ERS Confidentiality Agreement in their proposal package, which is uploaded into HIePRO for award consideration of the RFQ.
20. Awardee to provide all labor, materials, equipment and supervision to complete the election services per terms and conditions specified in this RFQ All services which includes mailing the ballots, maintaining election services procedures, setting up post office boxes, tallying the ballots and other activities specified in the scope pursuant to Chapter 6-24, of the Hawaii Administrative Rules.

**HIePRO REQUEST FOR QUOTATION (RFQ) 23002274  
Board of Trustees Election Services 2023**

**TERMS AND CONDITIONS**

**1. OFFEROR QUALIFICATION:**

**1. Local Presence:**

Offeror to have an office in Hawaii to support the specifications of this RFQ and able to meet with ERS personnel during regular business hours.

**2. Experience:**

2.1 Offeror to have a minimum of one (1) year of experience performing election services for a client of similar, size, scope and complexity of ERS organization

2.2 Offeror to have conducted election services within the past five (5) years for a minimum of 1 organization meeting requirements of 2.1 above.

2.3 Offeror's primary account contact assigned to this engagement to have experience conducting business with the State of Hawaii.

**2. TERM OF SERVICE**

2.1 Awardee to commence engagement under the terms and specifications of this RFQ within the timeframe of Attachment A upon PO receipt or Notice to Proceed (NTP).

**3. PRICING**

3.1 Offeror to annotate Attachment B, Offeror Information and to insert their quote for services on the form and affix signature. This same quote value the Offeror shall place in HIePRO, Offer section of this RFQ as the firm, fixed, complete competitive bid price for Offeror providing and performing under the terms and conditions of this RFQ for the contract term. Per the State of Hawaii, award will be made to the Offeror who has provided the best costing from the most responsible and responsive offeror

3.2 Offeror's price quotation shall be a firm and fixed, to include all fees charged by offeror incurred in or associated with performing the services, except for the postage; of which the awardee shall invoice ERS for reimbursement.

**4. INVOICING AND PAYMENT:**

4,1 Awardee shall prepare an invoice acceptable per State of Hawaii requirements and email same with their service report for the effected month, noting the deliverables fulfilled from the scope of services to the below bill to after the last day of the effective service month. Awardee to mail the original hardcopy invoice with report and original signatures to the ship to below within 10 days of the emailed invoice. Invoice to be paid net 30 days after the receipt of an acceptable invoice per State of Hawaii requirements.

<p><b>Bill to:</b> Employees' Retirement System Attn: Accounting Accounts Payable 201 Merchant St, Suite 1400 Honolulu, Hawaii 96813 Email: <a href="mailto:DBF.ERS.AccountsPayable@hawaii.gov">DBF.ERS.AccountsPayable@hawaii.gov</a></p>	<p><b>Ship to:</b> Employees' Retirement System 201 Merchant St, Suite 1400 Honolulu, Hawaii 96813 Accounts Payable BOT Election</p>
--	--



# OFFEROR SUBMITTALS

## **1. Offeror Proposal:**

1. Offeror shall prepare a proposal and upload it into HiePRO at the time of quote submittal in HiePRO. The proposal shall include the following:
  - Company portfolio
  - Length of time in business.
  - Resumes of key personnel assigned to this engagement.

## **2. Attachments**

- Offeror to prepare, complete upload Attachments B: completed and signed which contains
  - Offeror company information.
  - Compliance Questions
  - References

## **2. Compliance:**

- Offeror is to be duly registered to do business in the State of Hawaii via DCCA registration, ([cca.hawaii.gov/resources](http://cca.hawaii.gov/resources)) and to be compliant in Hawaii Compliance Express ([vendors.ehawaii.gov/hce](http://vendors.ehawaii.gov/hce)) by the date and time of RFQ closing

## **3. Confidentiality Agreement:**

- Offeror is to complete and sign the attached Confidentiality agreement and upload into HiePRO at the time of bid submittal.

## **4. Attachment B, Offer Form, references section:**

- Offeror if using sub-contractors are to have their sub-contractors also fill in the attachment B, offer form and Offeror is to upload these forms in their proposal package into HiePRO at the time of bid submittal.

**ATTACHMENT A**  
**2023 TIMELINE (Approximate), BOARD OF TRUSTEE ELECTION**

DESCRIPTION OF TASK	ESTIMATED COMPLETION DATE OR COMPLETED DATE	COMMENTS
1. Procure Contract Services	Week of May 29, 2023	
2. ERS Staff to work with Contractor to finalize election services and activities.	June 2023	
3. Printing of sets of ballots, voting instructions, candidate information sheets, mailing envelopes and return envelopes. Assemble ballots sets for mailing.	July-August 2023	
4. Mail out ballots sets.	September 5, 2023	
5. Maintain list of the names and addresses of the ERS members and retirants to whom ballots were mailed.	Beginning September 5, 2023	
6. Issue new ballots, if needed.	September 5, 2023– October 2, 2023	
7. Collect ballots from post office box.	September 11, 2023 – October 20, 2023	Envelope must be postmarked on October 13, 2023, to be considered timely.
8. Open and tally ballots under the supervision of the Election Committee.	October 23-26, 2023	ERS to contact union organizations for committee members by 9/22/2023.
9. Report and certify election results to the Election Committee.	November 3, 2023	ERS would like to report the election results at its November 13, 2023, Board Meeting.
10. Secure tallied ballots.	November 2023 to February 3, 2024	
11. Destroy tallied ballots	February 3, 2024	Ballots to be held for thirty days and can be destroyed if no election questions asked.

**ATTACHMENT B  
OFFER FORM, (4 PAGES)  
OFFEROR INFORMATION**

**OFFEROR INFORMATION**

Legal Name of Entity: \_\_\_\_\_  
Name of Firm: \_\_\_\_\_  
Address: Street Address \_\_\_\_\_  
Address: City, State, Zip \_\_\_\_\_  
Company Representative: \_\_\_\_\_  
Title: \_\_\_\_\_  
Phone: \_\_\_\_\_  
Fax: \_\_\_\_\_  
E-mail: \_\_\_\_\_  
Website: \_\_\_\_\_  
Federal Tax ID \_\_\_\_\_  
Hawaii State General Excise Tax ID \_\_\_\_\_

**PRICE QUOTE**

**SUM TOTAL QUOTE VALUE  
TO PROVIDE AND  
PERFORM PER  
SPECIFICATIONS OF THIS  
RFP FIRM AND FIXED.  
THIS QUOTED VALUE ALSO  
TO BE PLACED INTO THE  
PRICE QUOTE SECTION IN  
HIEPRO**

\_\_\_\_\_  
*Prices shall remain firm for 60 calendar days.*

Quote No. \_\_\_\_\_ Quote is valid thru \_\_\_\_\_

***All quotes shall be signed and dated by an authorized individual of the company.***

Signature: \_\_\_\_\_ Date: \_\_\_\_\_

Printed Name: \_\_\_\_\_ Printed Title: \_\_\_\_\_

**ADDITIONAL INFORMATION OR TERMS**

\_\_\_\_\_ Check if you have attached additional information or terms (i.e., delivery time, warranty period).

**ATTACHMENT B**  
**OFFER FORM**  
**COMPLIANCE QUESTIONS**

**COMPLIANCE QUESTIONS/QUALIFICATIONS**

Offeror shall comply with ALL the following qualification items as described in Attachment A, OFFEROR QUALIFICATIONS, Section 3. Any non-compliance (i.e., any “No” answers) will result in the offeror not qualifying for this award.

- a. Offeror has a minimum of one (1) year of experience performing election services for a large complex organization. Yes \_\_\_No \_\_\_
- b. Offeror has conducted election services within the past five (5) years for at a minimum of (1) organization of similar size, scale & complexity as ERS. Contact information for these election services must be provided in response to the references section below. Yes \_\_\_\_\_ No \_\_\_\_\_
- c. Offeror has a Hawaii-based office or sub-contractor office in Hawaii and the ability to meet with ERS staff and others during ERS business hours. Yes\_\_\_\_\_No \_\_\_\_\_
- d. Offeror’s primary account contact has experience conducting business in Hawaii. Yes\_\_\_No \_

**ATTACHMENT B  
OFFER FORM  
REFERENCES**

REFERENCES TO CONFIRM THE FOLLOWING OFFEROR QUALIFICATIONS:

- 1. Offeror: List client(s) from the past 5 years where offeror conducted election services for an organization of similar size, scale and complexity as ERS. Offeror hereby authorizes the Employees' Retirement System of the State of Hawaii to contact these clients.**

( 1 ) Client Name: \_\_\_\_\_

Contract Person: \_\_\_\_\_

Telephone Number: \_\_\_\_\_ Facsimile Number: \_\_\_\_\_

E-mail Address: \_\_\_\_\_

Description of Services Provided: \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

Contract Period of Service Provided: \_\_\_\_\_

( 2 ) Client Name: \_\_\_\_\_

Contract Person: \_\_\_\_\_

Telephone Number: \_\_\_\_\_ Facsimile Number: \_\_\_\_\_

E-mail Address: \_\_\_\_\_

Description of Services Provided: \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

Contract Period of Service Provided: \_\_\_\_\_

( 3 ) Client Name: \_\_\_\_\_

Contract Person: \_\_\_\_\_

Telephone Number: \_\_\_\_\_ Facsimile Number: \_\_\_\_\_

E-mail Address: \_\_\_\_\_

Description of Services Provided: \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

Contract Period of Service Provided: \_\_\_\_\_

**ATTACHMENT B**  
**OFFER FORM**  
**REFERENCES / SUB-CONTRACTORS**

REFERENCES TO CONFIRM THE FOLLOWING SUBCONTRACTOR QUALIFICATIONS (IF APPLICABLE):

1. **Subcontractor: List client(s) from the past 5 years where offeror conducted election services for a large complex organization. Offeror hereby authorizes the Employees' Retirement System of the State of Hawaii to contact these clients.** \_\_\_\_\_ Mark here if no subcontractor.

( 1 ) Client Name: \_\_\_\_\_

Contract Person: \_\_\_\_\_

Telephone Number: \_\_\_\_\_ Facsimile Number: \_\_\_\_\_

E-mail Address: \_\_\_\_\_

Description of Services Provided: \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

Contract Period of Service Provided: \_\_\_\_\_

( 2 ) Client Name: \_\_\_\_\_

Contract Person: \_\_\_\_\_

Telephone Number: \_\_\_\_\_ Facsimile Number: \_\_\_\_\_

E-mail Address: \_\_\_\_\_

Description of Services Provided: \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

Contract Period of Service Provided: \_\_\_\_\_

( 3 ) Client Name: \_\_\_\_\_

Contract Person: \_\_\_\_\_

Telephone Number: \_\_\_\_\_ Facsimile Number: \_\_\_\_\_

E-mail Address: \_\_\_\_\_

Description of Services Provided: \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

Contract Period of Service Provided: \_\_\_\_\_