



## REQUEST FOR QUOTES (RFQ) ADDENDUM NO. 3

**Solicitation No.:** RFQ-24-002-OPS

**Solicitation Title:** Grant Management Software

**Agency:** Hawai'i State Energy Office (HSEO)  
Department of Business, Economic Development & Tourism

**Response Deadline:** April 30, 2024, 2:00 P.M. (Hawai'i Standard Time)

**Pre-Bid Meeting:** April 9, 2024, 9:30 A.M. (Hawai'i Standard Time) on Zoom  
<https://us06web.zoom.us/j/87365529540?pwd=VWoktUaaaSUukcHfN6RqX99L0glow3.1>

All questions regarding this solicitation shall be submitted in writing via email to [dbedt.hseo.solicitations@hawaii.gov](mailto:dbedt.hseo.solicitations@hawaii.gov). Only questions received by ~~[March]~~ April 24, 2024, 4:30 P.M. (Hawai'i Standard Time) will be guaranteed a reply.

Mark B. Glick  
Chief Energy Officer  
Hawai'i State Energy Office  
Department of Business, Economic Development & Tourism

Internet Posting: March 27, 2024

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HSEO is committed to providing equal access consistent with the Americans with Disabilities Act (ADA), the Americans with Disabilities Act Amendments Act of 2008 (ADAAA), and other state and federal laws. If you have a disability that may restrict your ability to meaningfully participate in this solicitation, we will provide you with reasonable and appropriate accommodation at no cost to you. If you need an auxiliary aid/service or other reasonable accommodation, please contact Kathy Yim by phone at 808-460-7995 or by email at [kathy.yim@hawaii.gov](mailto:kathy.yim@hawaii.gov). Requests made as early as possible will allow time for us to better serve you.

For screen reader users: HSEO recognizes the use of diacritical markings of the Hawaiian language such as the 'okina (also called a glottal stop) and the kahakō (also called a macron). Please note that screen readers may not read or pronounce the Hawaiian words correctly.

## SUMMARY OF ADDENDUM CHANGES

- **Addendum No. 1:**
  - Deadline for questions is changed from March 24, 2024 to April 24, 2024.
  
- **Addendum No. 2:**
  - Pre-bid meeting information is added on the cover page.
  - Background on anticipated usage of the software is added in the “Overview” section.
  - “Evaluation Criteria” section is revised to include maximum scores for each criterion.
  - Responses to received questions are provided at the end of the document (Questions 1-26).
  
- **Addendum No. 3:**
  - Additional responses to received questions are provided at the end of the document (Questions 27-33).
  - Pre-bid meeting minutes are provided at the end of the document.

## OVERVIEW

Since the passage of Act 97, Session Laws of Hawai'i 2015, the landmark bill making Hawai'i the first state in the nation to set a 100 percent renewable portfolio standard for the electricity sector by 2045, the Hawai'i State Energy Office (HSEO) has been committed to applying for numerous federal funding opportunities to support energy efficiency, renewable energy, and clean transportation projects across the state. As Hawai'i moves closer towards its zero-emission clean economy target enacted by Act 15, Session Laws of Hawai'i 2018, HSEO continues to take on more federal funding opportunities, all of which come with a multitude of grant management responsibilities.

Through this Request for Quotes (RFQ), HSEO is soliciting offers for grant management software to assist in various aspects of grant management such as reporting, deadline tracking, and analytics.

HSEO expects to use this software as a grant applicant and recipient to manage grant processes throughout the full lifecycle of a funding opportunity. This includes pre-award management of applications, as well as post-award management of reporting and closeout. HSEO is also interested in the ability to manage subrecipient communications and collaborations. The office does not plan to use the software to receive grant applications, as selection of subrecipients or contractors will typically be made via State procurement systems.

## SPECIFICATIONS

### REQUIRED FEATURES

- Grant management (award and post award) including:
  - Reporting and closeout management
  - Deadline notifications/alerts
  - Project dashboard views
  - Status and budget tracking
  - Ability to assign tasks and activities
- Microsoft software compatibility
- User scalability and flexible pricing
- Readily available technical support
- Implementation assistance and technical support
- Advanced reporting and performance analysis

### OPTIONAL FEATURES

- Microsoft 365 integration
- Pre-award management including:
  - Application management
  - Deadline notifications/alerts
  - Project dashboard views and status tracking
  - Ability to assign tasks and activities
- Collaborative workspaces for internal users
- Subrecipient and contractor management

## EVALUATION CRITERIA

Offers received will be evaluated using the criteria below. Offerors are asked to include relevant information in their offer that will facilitate evaluation, uploading attachment files with their offer if necessary.

<b>Criterion</b>	<b>Maximum Score</b>
Required features	<u>100</u>
Optional features	<u>50</u>
Price (including implementation and any maintenance/recurring costs)	<u>30</u>
Vendor technical support	<u>30</u>
Ease of implementation and maintenance	<u>10</u>

Offerors may be selected for award solely based on their submission, or they may be asked to clarify details of their offer before HSEO makes its decision. This may include clarifying whether certain features and services are included and/or providing a demonstration of the software if a demo video is not already available online.

## METHOD OF AWARD

Award of a contract shall be made to the offeror whose offer provides the best value to the State based on the evaluation criteria listed herein. "Best value" is defined as the most advantageous offer, determined by evaluating and comparing all relevant criteria in addition to price so that the offer meeting the overall combination that best serves the State is selected.

If a contract is awarded, a notice of award shall be posted on the State Procurement Office website.

Pursuant to Hawai'i Revised Statutes (HRS) §103D-308 and Hawai'i Administrative Rules (HAR) Subchapter 11, the solicitation may be canceled and no contract awarded if it is determined to be in the best interests of the State.

## OFFER SUBMISSION

The State has established the Hawai'i State eProcurement System (HlePRO) as an open and transparent system for vendors to compete for State contracts electronically. Offerors interested in responding to this solicitation must be registered on HlePRO. Guidance on how to register can be found at the Vendor Registration Guide link on the HlePRO homepage: <https://hiepro.ehawaii.gov/>

HSEO will use HlePRO to issue this solicitation and receive all offers. Offers submitted outside of HlePRO will not be accepted.

Awards for this solicitation, if any, shall also be made through the HlePRO system and shall therefore be subject to a transaction fee of 0.75% of the award, not to exceed \$5,000.

Pursuant to HAR §3-122-16.08(b), late offers submitted after the offer deadline will not be considered for award.

## **OFFER WITHDRAWAL OR MODIFICATION**

Offers for this solicitation may not be withdrawn or modified after the offer deadline.

## **RESPONSIBILITY OF OFFERORS**

Offerors are advised that to be awarded under this solicitation, they are required to be compliant with all laws governing entities doing business in the State, pursuant to Hawai'i Revised Statutes (HRS) §103D-310(c) and including the following chapters:

- HRS Chapter 237, General Excise Tax Law
- HRS Chapter 383, Hawai'i Employment Security Law
- HRS Chapter 386, Worker's Compensation Law
- HRS Chapter 392, Temporary Disability Insurance
- HRS Chapter 393, Prepaid Health Care Act

If an offeror is not compliant with the applicable laws at the time of award, they may not receive the award. HSEO reserves the right to move on to the next responsive, responsible offeror who is compliant.

HSEO will verify compliance on Hawai'i Compliance Express (HCE). Offerors who do wish to use the HCE system may submit paper compliance certificates to HSEO at the time of award. More information regarding HCE can be found on its website:

<https://vendors.ehawaii.gov/hce/>

## **GENERAL CONDITIONS**

The General Conditions, attached to the electronic posting of this solicitation, shall apply to the contract resulting from this solicitation. The most up-to-date version of the General Conditions is posted on the State Procurement Office website as Form Number AG-008 103D: <https://spo.hawaii.gov/all-forms/>

## **SPECIAL CONDITIONS**

The resulting contract will be fully or partially funded by federal funds from the State Energy Program Formula Grant PY2023 (CFDA Number 81.041, Award Number DE-EE0009478.0003). As such, the contractor shall additionally be required to abide by all applicable terms and conditions of the federal award (Special Conditions). The Special Conditions are attached to the electronic posting of this solicitation.

## **QUESTIONS**

All questions regarding this solicitation shall be submitted in writing via email to [dbedt.hseo.solicitations@hawaii.gov](mailto:dbedt.hseo.solicitations@hawaii.gov). Only questions received by 4:30 P.M. (Hawai'i Standard Time) on ~~March~~ April 24, 2024 will be guaranteed a reply.

## **CONFIDENTIAL SUBMISSIONS**

Any offeror who believes that a portion of their submission or correspondence with HSEO contains information such as designated trade secrets or other proprietary data that should be withheld as confidential is asked to notify HSEO in writing and provide justification to support their confidentiality claim. Pricing is not considered confidential and will not be withheld.

The material designated as confidential must be readily separable from the submission in order to facilitate eventual public inspection of the non-confidential portion of the submission.

The head of the purchasing agency or designee shall consult with the Attorney General, who shall make a written determination of whether the material designated as confidential is subject to disclosure. If the request for confidentiality is denied, the information will be made open to public inspection unless the offeror appeals the denial to the Office of Information Practices in accordance with HRS §92F-42(1).

## **ADDITIONAL INFORMATION**

Costs for developing offers are solely the responsibility of the offeror. Whether or not any award results from this solicitation, HSEO will not reimburse such costs.

## **RESPONSES TO QUESTIONS**

<b>Question</b>	<b>Response</b>
1. What is the total estimated dollar amount of the grants HSEO will be dispensing on an annual basis?	HSEO is unable to provide an annual estimate since it is dependent on the amount of funding that the federal government makes available and the types of projects developed out of that funding. These factors vary from year to year.
2. How many different grant programs does HSEO intend to support with this system? Please list the different grants that will be dispensed using the system.	HSEO is currently managing more than 10 grants and subgrants with awards totaling more than \$19 million. We are also in the negotiation/selection phase for 8 grants with award amounts totaling more than \$63 million dollars.
3. According the RFQ, "the resulting contract will be fully or partially funded by federal funds from the State Energy Program Formula Grant PY2023 (CFDA Number 81.041, Award Number DE-EE0009478.0003)." The US Department of Energy has published the final allocations of this grant and Hawaii received \$458,560 of the \$60M in funding available. How much of this amount will be used to fund the new grant system? How much additional budget has HSEO/DBEDT set aside for this system procurement? What is the total amount budgeted?	HSEO is opting not to disclose the budget for this procurement. We are asking that offerors submit bids for software packages that are appropriately sized for our needs.
4. Will there be a need to integrate with other data sources? If so, please list these data sources, including format and system.	No, there is no integration with other data sources needed at this time.
5. How many internal users are expected to use the system?	HSEO is expecting at least 11 users on this platform to start.
6. What is the approximate number of applicants expected to use the system annually?	None. HSEO will not be using the system to receive grant applications.

<p>7. What is HSEO's desired implementation timeline? What is the desired "go-live" date?</p>	<p>Our timeline for implementation is flexible.</p>
<p>8. What is the specific Microsoft compatibility and integration HSEO is looking for?</p>	<p>Regarding compatibility: HSEO would like the system to allow for the upload of Microsoft files (Word, Excel, etc.). Regarding integration: see response to Question 15.</p>
<p>9. What is the current system of record being used by HSEO? Will data need to be migrated from that system to the new one? Is this included within the scope?</p>	<p>HSEO operates primarily through Microsoft Teams, Outlook, and other Microsoft 365 applications. All grant documentation is currently stored in this system. We are looking for a software that will centralize and expand our grants management capabilities. Migration of data by the contractor is not required.</p>
<p>10. Does HSEO currently process applications online? Are they looking to digitize the application process?</p>	<p>HSEO operations are digitized in that collaborative work is done online and applications are submitted online.</p>
<p>11. Does HSEO want the new system installed in their IT environment? Or does HSEO prefer a vendor-hosted/SaaS solution?</p>	<p>A vendor-hosted/SaaS solution is preferred but not a requirement.</p>
<p>12. Given the State's desire to have something Microsoft compatible, if a Microsoft solution is proposed, does the State currently have a Microsoft tenant for hosting the solution?</p>	<p>Yes, the State does have a Microsoft tenant.</p>
<p>13. Does the new grants system need to integrate with any existing HSEO (or other State of Hawaii agency) systems?</p>	<p>No integration with existing systems is needed at this time.</p>
<p>14. Please elaborate on advanced reporting and analysis. What are HSEO's expectations around this requirement?</p>	<p>HSEO is looking for a system that will not only assist in grants management but will also be able to summarize and provide insights on grant activities and HSEOs grant portfolio (i.e. financial and performance insights).</p>
<p>15. Please elaborate on collaborative workspaces. What types of materials and information would need to be</p>	<p>If possible, we would like a system similar to Microsoft Teams where different users can review, edit, and create deliverables throughout the grant life cycle.</p>



<p>shared in a collaborative workspace?</p>	<p>Deliverables ideally would be able to be saved or exported as Microsoft file types (e.g. Word documents, Excel worksheets, etc.)</p>
<p>16. What are the specific evaluation criteria HSEO will use to evaluate bids? Can you provide a scoring system (e.g. Price = 30 points, etc.)?</p>	<p>HSEO has revised the “Evaluation Criteria” section of the solicitation to provide additional details on how bids will be evaluated.</p>
<p>17. Is there a reason HSEO is not asking for vendors to present qualifications of prior experience in their response? Is HSEO open to vendors including quals in their response?</p>	<p>Vendors may submit qualifications as an attachment to their bid. Past experience will be considered as part of the evaluation of vendor responsibility (defined by Hawai’i Revised Statutes Chapter 103D as “capability in all respects to perform fully the contract requirements, and the integrity and reliability that will assure good faith performance”)</p>
<p>18. Is there a more detailed application requirements list that you could share with us?</p>	<p>All requirements are included in the solicitation document.</p>
<p>19. Could you describe the ideal Grant Application lifecycle process that the software application needs to support.</p> <p>For example:</p> <ul style="list-style-type: none"> <li>• What different user groups (personas) will have access to the system?</li> <li>• Who (what user group(s)) creates the grant applications?</li> <li>• What does the grant application approval process look like?</li> <li>• Where are Grant Applications published? Is there a public web site that this application needs to integrate with?</li> <li>• How do applicants apply for these grants?</li> <li>• Who reviews the grant application submissions and what does the review process look like?</li> </ul>	<p>The primary individuals that will have access to the software would be designated HSEO users. We are also interested in the option to provide limited access to subrecipients from outside HSEO who, for their period of performance, would have access to the necessary information pertaining to their award.</p> <p>HSEO expects to use this software as an applicant and recipient to manage grant processes throughout the full lifecycle of a funding opportunity. This includes pre-award management of applications, as well as post-award management of reporting and closeout. HSEO is also interested in the ability to manage subrecipient communications and collaborations. The office does not plan to use the software to receive grant applications, as selection of subrecipients</p>

	or contractors will typically be made via State procurement systems.
20. Does the application need to integrate with any financial systems for budget tracking?	While HSEO is looking for budget tracking capabilities, we do not require integration with our financial systems if manual data input is allowed.
21. Does the application need to integrate with any state or federal systems?	No, a standalone application is acceptable.
22. Can HSEO provide more details on the requirements for status and budget tracking? Will the system be required to process payments and produce financial reports like an ERP system?	HSEO would like a centralized and streamlined system that will be able to track funds received and expended across our awards. We do not expect the software to process payments.
23. Can HSEO provide the list of Microsoft Cloud Services and/or licenses in use today? (eg. M365, Azure, Power Apps, Power BI, etc.)	M365 and Azure.
24. Please describe the Project Team Members/Stakeholders from HSEO and their weekly availability to participate in the Grant Management software project.	Availability of HSEO team members to participate in the software project will be discussed with the awarded contractor.
25. Can HSEO confirm that Change Management, User Adoption, User Training activities should be included as a part of the Grant Management Software project?	Yes, HSEO confirms that these items should be included.
26. Is HSEO open to a phased release of features? For example, Required Features released in phase 1 and optional features in phase 2?	HSEO is open to a phased release.
27. How many unique grant application formats do you currently utilize? Do your applications differ by program? Do they share common questions? Roughly, what is the average count of questions asked?	To clarify, HSEO will not be using the software to receive grant applications. In terms of pre-award functions, we will be utilizing the software to manage our applications to federal grants via federal portals. The software does not need to interface with these portals but should support organization of information and files specific to each grant so that it can be easily compiled for submission.

<p>28. What are the roles and permissions and segmentation to create that make up discrete processes for your different departments?</p>	<p>Currently, we expect that all users will have the same level of access to the software. No differentiation of roles and permissions is needed.</p>
<p>29. Reporting: Can you provide example metrics you want to track in your new GMS? How are these impact metrics tracked currently?</p>	<p>HSEO is interested in tracking spending of awarded funds and overall insights into our grant portfolio (i.e. types of funding, project completion status, sources of funding.)</p>
<p>30. What triggers data flow? Any data diagrams?</p>	<p>No automated data flow is required at this time.</p>
<p>31. What is HSEO’s capacity to support the solution post-project, and what is expected from the vendor? Is there a clear hand-off point at which time the vendor would be engaged vs. internal triage?</p>	<p>HSEO’s expectation is that there would be minimal maintenance and support required from us once the software is implemented. We expect that the vendor will provide ongoing technical and troubleshooting support on an as-needed basis for the duration of the contract.</p>
<p>32. Does HSEO expect or prefer on-site implementation and/or training sessions?</p>	<p>While HSEO is open to the option, on-site implementation and/or training is not expected.</p>
<p>33. Will HSEO look to pilot programs first, or pursue an implementation with a “big bang” approach?</p>	<p>HSEO is open to either option.</p>

## **PRE-BID MEETING MINUTES**

PRE-BID MEETING: GRANT MANAGEMENT SOFTWARE  
TUESDAY, APRIL 9, 2024 (9:30 AM HST)

### **Agenda**

Meeting Lead: Amy Chang

Other HSEO Attendees: Catherina Pratt, Amanda Lui

1. Welcomes and Introductions
2. Key Points
3. Solicitation Reminders
4. Q&A

### **Key Points**

#### **Usage**

- HSEO intends to use this software as a grant *applicant* and *recipient* to manage its grant applications and grant awards. We will NOT use the software to receive any grant applications or award any grants.

#### **Users, Access, Roles**

- HSEO expects there will be 11 internal users of the software to start. We are requiring the software to have flexibility to add more users later if needed.
- Currently, we expect that all users will have the same level of view and edit access to the software. No differentiation of roles and permissions is needed.
- We are interested in the option to provide limited access to subrecipients from outside HSEO who, for their period of performance, would have access to view and edit the necessary information pertaining to their award. Ability of the software to allow limited access is not a requirement, however.

#### **Integration**

- Integration with existing systems or data sources is not required at this time. HSEO expects to enter data by manual input.

#### **Implementation & Maintenance**

- HSEO prefers software that requires minimal staff time for implementation and subsequent maintenance.
- If HSEO staff time is required for software development and/or implementation, we will discuss and make appropriate arrangements with the selected contractor.
- Our timeline for implementation is flexible.

## Clarification of Specifications

- Clarification of “Microsoft software compatibility”:
  - o HSEO would like the system to allow for the upload of Microsoft files (Word, Excel, etc.).
- Clarification of "Advanced reporting and performance analysis":
  - o HSEO is interested in tracking spending of awarded funds and overall insights into our grant portfolio (i.e. types of funding, project completion status, sources of funding.)
- Clarification of “Microsoft 365 integration” and “Collaborative workspaces for internal users”:
  - o HSEO is interested in software which either integrates with Microsoft apps or, like Microsoft Teams, allows different users to review, edit, and/or create grant deliverables within the platform. Deliverables ideally would be able to be saved or exported as Microsoft file types (e.g. Word documents, Excel worksheets, etc.)

## Solicitation Reminders

- Public responses to vendor questions are posted as addenda to the solicitation on the State’s HlePRO procurement website.
- “Required Features” listed in the “Specifications” section are required for bids to be considered responsive. By law, we are unable to consider bids that are not responsive for award.
- Please submit any supplemental materials as an attachment to your bid.
- In relation to international companies and work performed outside of the US:
  - o For businesses incorporated outside of the US, registration on HlePRO will require an international EIN number. Please contact the IRS at 267-941-1099 (not a toll-free number) between the hours of 6 A.M. to 11 P.M. Eastern Time Monday through Friday.  
Source: <https://www.irs.gov/businesses/small-businesses-self-employed/how-to-apply-for-an-ein>
  - o Please review Paragraphs 4 and 5 of the Special Conditions attached to the solicitation.