

# Amendment 6

## Enterprise Financial System (RFP-EFS-2025)

Dated March 20, 2026

### Request for Best and Final Offer (BAFO)

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**Due Date for Amendment 6 Response:** No later than 2:00 PM HST on **April 3, 2026**. The Amendment 6 response shall be submitted via HlePRO. No hard copy submissions will be accepted or required.

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## Amendment Instructions

1. Amendment 6 provides the Offerors with an opportunity to improve or otherwise amend any area or aspect of its original State of Hawaii Enterprise Financial System (EFS) Proposal based on the additional information provided in this amendment.
  2. If the Offeror amends its original proposal, the Offeror shall comply with *Revision 14 – Change Log Requirement*. The Offeror must submit a Change Log as a separate attachment to the proposal that clearly identifies and summarizes all updates to the original proposal and references the applicable Revision 1-10 so the impact of each revision can be clearly understood. Only the RFP section(s) indicated as pertinent to a given Revision may be updated, and any Proposal section updated in the BAFO must be clearly identified.
  3. All Amendment 6 attachments shall be identified and include the naming convention "AMD6" (example: AMD6-001, AMD6-002, AMD6-003).
  4. If any Offeror fails to submit an updated proposal by the Due Date, the Offeror's original proposal submitted shall be deemed to be the Offeror's most current proposal.
  5. Amendment 6, along with the Change Log and attachments, are due no later than 2:00 pm HST on April 3, 2026. Responses shall be submitted via HlePRO. No hard copy submissions will be accepted or required.
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## Revisions

This Amendment 6 is issued for the EFS Request for Proposals (RFP). This amendment modifies and clarifies certain requirements of the RFP. Except as expressly modified herein, all other terms and conditions of the RFP remain unchanged and in full force and effect.

Offerors shall review this amendment in its entirety and submit an updated proposal that reflects the requirements, clarifications, and determinations described below. The Amendment 6 submissions shall include any necessary updates to the proposed solution, technical architecture, implementation approach, assumptions, timeline, and pricing. Offerors shall clearly identify and describe the updates made in response to Revision 1-10 so the impact of each revision can be readily understood, including clearly indicating which (if any) sections of the Proposal have been modified in response to each Revision.

Failure to address the items identified in this amendment may result in the Offeror being considered non-responsive.

## Revision 1. Executable Statement of Work

*Reference: RFP – 7.2.7 Technical Approach*

Offerors are required to submit an Executable Statement of Work (SOW) as part of its response to this Amendment 6. The Executable SOW is not a sample. It must clearly define all deliverables, milestones, tasks, timelines, and responsibilities necessary for successful implementation of the proposed EFS solution. The SOW must be sufficiently detailed and actionable to serve as the basis for contract execution and project management, reflecting any updates, clarifications, or changes to the scenarios outlined in the RFP and Amendments 1-5.

## Revision 2. Executable Order Form

*Reference: RFP – 7.2.10 Price*

Offerors are required to submit an Executable Order Form as part of its response to this Amendment 6. The Executable Order Form must clearly specify all software products, modules, licenses, and software-related services being offered, quantities, pricing, and terms. The Order Form must be sufficiently detailed and actionable to enable the State to place orders and initiate contract execution in accordance with the requirements of this RFP and Amendments 1-5.

## Revision 3. Updated Price Proposal

*Reference: Attachment 6 Price Proposal Form*

Offerors are expected to submit an updated Price Proposal, as part of its response to this Amendment 6. Price Proposals should be submitted via the workbook template from Attachment 6 of the original RFP, including any required annual breakdowns. Any changes should be indicated as described in Revisions 13 and 14 below.

## Revision 4. Updated Staffing Plan

*Reference: RFP – 4.5 Offeror’s EFS Project Team*

Offerors are required to submit an updated month-by-month Staffing Plan for both the Offeror and the State as part of its response to this Amendment 6. The Staffing Plan must include the full-time equivalent (FTE) count for each position, for both the Offeror and the State, for the duration of the project. Additionally, the Staffing Plan must clearly indicate which Offeror resources will be on-site with the State, hybrid, or remote, for each project phase.

## Revision 5. Direct Licensing

*Reference: Attachment 6 Price Proposal Form*

The State reserves the right to enter into separate contracts with Offerors and has a strong desire for direct licensing of the proposed software product(s) and services. Offerors are expected to reflect a direct software licensing model as part of its response to this Amendment 6.

## Revision 6. Functionality Clarifications

*Reference: Attachment 7 – Scenario Response Template (Appropriation Accounts: GL-05 and GL-03; Trust Management: TM-01-02; Quarterly Allotments: GL-01; and Configuration Flexibility: WM-01-02)*

Offerors are expected to ensure its final submitted proposals are updated to reflect the functional needs of the State, as discussed during Discussions between the State and Offerors. Offerors are expected to ensure its proposals reflect the needed functionality for:

- Appropriation Accounts
- Trust Management
- Quarterly Allotments
- Configuration Flexibility

## Revision 7. Updated Secondary Systems Inventory and Data Migration and Integration Priority

*Reference: RFP – 5.2 SaaS Financial Management Solution Specifications*

The State has updated the inventory of EFS relevant secondary systems and made the revised list available through the Offeror's Library (<https://ags.hawaii.gov/efs/offerors-library/>). **Data migration and integration with relevant secondary systems is a high priority for this implementation.** While some of the systems currently designated to be retained (on-going integrations) might end up being decommissioned (data migrated into EFS) as a result of additional discovery and OCM with the departments, the overall list of systems provides the Offerors with insights on the list of relevant systems for EFS.

Offerors shall review the updated secondary systems inventory and consider the additional discovery and analysis completed by the State. Proposals, including pricing and assumptions, shall be updated as appropriate to account for systems that may be migrated, decommissioned, or replaced by the Offeror's proposed solution or functionality. Additionally, Offerors shall account for the total integration efforts required to address all temporary integrations (that may be needed prior to full EFS functional and group releases) and permanent integrations (on-going with retained secondary systems). Offerors should prioritize its integration approach to address secondary system connectivity as a critical success factor.

**Important Notice Regarding Hawaii Information Portal (HIP):** The existing Hawaii Information Portal (HIP), which is based on Oracle PeopleSoft, is dependent upon manual HR processes and therefore the timeliness of the HR data may be delayed. Offerors should not rely solely on HIP for HR data and shall propose alternative data sources and validation mechanisms in its integration strategies.

## Revision 8. Implementation Timeline and FAMIS Transition Requirements

*Reference: RFP – 4.1 Proposed Phased Deployment*

**Critical Implementation Planning Requirement:** The State must plan for decommissioning the existing Financial Accounting and Management Information System (FAMIS) as soon as reasonably possible while minimizing implementation and operational risks. Offerors are requested to update its implementation plan with a balanced approach that considers:

- **Best effort implementation approach** that accelerates time to production while maintaining quality standards and accounts for the State’s staff and resourcing constraints.
- **Ability to produce the Annual Comprehensive Financial Report (ACFR)** from the future EFS system as a single source of truth.
- **Business continuity with minimal risk** to the State during the transition period.
- **Limited dual-system operation period** as the State cannot reasonably maintain both FAMIS and EFS.

Materials that were shared during the implementation approach discussion are available in the Offeror’s Library.

**Business Continuity Challenge:** While some departments submit its financial information via Standard Forms which are available in the Offeror’s Library, Offerors shall address how business operations will be maintained when FAMIS is decommissioned (both front end UI and backend database) and until the department can be onboarded to the new EFS. The implementation plan shall include:

- An onboarding strategy that eliminates or minimizes the period between FAMIS decommissioning and EFS availability for each department while balancing State staffing and resource constraints.
- Interim data collection and processing procedures for departments not yet onboarded to EFS to minimize the risks of reconciling data and reporting out of EFS and legacy systems.
- Risk mitigation strategies to ensure no disruption to financial reporting and operations.
- Timeline optimization to reduce the dual-system maintenance burden on State resources.
- Specific milestones for ACFR readiness and FAMIS retirement, including milestones for the phasing of departments to become native users of EFS.

Offerors shall revise its proposal to reflect an optimized implementation timeline that balances speed, risk mitigation, and the State's operational constraints. Proposed timelines, assumptions, resource requirements, and pricing shall be updated accordingly.

## Revision 9. Procurement System Determination

*Reference: RFP – 4.3 Application Architecture; 5.2.1.3 Accounts Payable*

The State has determined that Periscope (ePro), known internally as Aloha eBUYS, will serve as the State's procurement solution. Procurement activities will be conducted using Periscope Aloha eBUYS.

Any purchasing, invoicing, accounts payable, or related financial processing requirements outside of procurement shall be supported by the Offeror's proposed EFS solution. Offerors shall revise its proposal to reflect this determination, including required integrations, assumptions, and pricing impacts.

## Revision 10. Identity Provider (IdP) Clarification

*Reference: RFP – 5.3.1 Hosting Services and Attachment 7 – Scenario Response Template (Security S-01-04)*

**Notice Regarding Identity Management:** The State operates multiple Security Assertion Markup Language (SAML) 2.0 / OpenID Connect (OIDC)-based identity providers (IdPs) serving different departments and user populations. The State's most populous enterprise IdP platform uses Microsoft Entra ID, while some departments use others IdPs (e.g., Microsoft Active Directory, and Shibboleth). These IdPs are currently not federated with each other.

Offerors shall update its proposal to reflect that the State does not operate a single, centralized, identity provider. Multiple State identity providers (IdPs) currently exist throughout the executive branch. Accordingly, the proposed EFS solution must support authentication via each of the independent State-managed IdPs, including but not limited to Microsoft Entra ID, to enable user access as applicable.

The EFS application shall rely on these IdPs for authentication (e.g., username/password, MFA) and shall accept a valid security assertion (e.g., SAML) from each participating IdP. Upon successful authentication, all user authorization, role assignment, and access control enforcement shall be managed within the EFS solution itself.

The proposed solution shall support:

- Efficient user authentication and authorization inclusive of all software products proposed and considered as part of the EFS solution
- Enforce automated user provisioning and de-provisioning workflows for all EFS users (e.g., using System for Cross-domain Identity Management [SCIM]). User provisioning and de-provisioning will be handled with a separate State-managed HR system, which is synched with the State's identity providers as needed.
- Be designed to avoid multiple security challenging end-users
- Implement EFS Role-based access controls (RBAC) aligned with State security policies
- Enable efficient ongoing authentication and authorization maintenance and operations
- Provide security auditing (e.g., logging of provisioning, authentication and authorization events), alerting (e.g., for anomalous access patterns) and reporting that is based on the States data retention policies with ability to export data to external Security Information and Event Management (SIEM) tools

Any additional identity authentication and authorization mechanisms required shall be clearly identified, along with associated costs, implementation requirements, and security considerations.

## Revision 11. Attachment 9 and Attachment 10 Updates

The following provisions are deleted in its entirety from the respective attachments:

- Attachment 9 State of Hawaii General Conditions: Section 19, “Modifications of Contract”
- Attachment 10 Supplemental General Conditions: Section 4.4, “Data”
- Attachment 10 Supplemental General Conditions: Section 24, “Guaranty”

## Revision 12. Notice Regarding Planned State Data Management and Analytics Platforms

*Reference: RFP – 4.3 Application Architecture*

The State of Hawaii is providing the following informational notice to prospective Offerors.

The State Chief Data Officer has informed the EFS team of the intent to establish and implement the following enterprise data products for use by the Executive Branch of the State of Hawaii:

- **IBM Master Data Management (MDM)** – Planned as the state's master data management solution; and
- **IBM watsonx.data** – Planned as the state's enterprise data Lakehouse and data governance platform.

At this time, ETS has not established an operational timeline or finalized implementation details for these platforms. This notice is informational only and is provided to ensure transparency about anticipated enterprise data initiatives.

Offerors are not required to modify its proposals or take any action in response to this notice. However, Offerors may, at its discretion, describe in its responses potential alignment or compatibility with these future State data platforms.

## Revision 13. Proposal Submission Requirements

Each Offeror shall submit one (1) complete, consolidated, and fully updated proposal. The proposal shall:

- Maintain the same format, organization, and section numbering as the original written proposal submitted in response to the RFP.
- Incorporate all changes resulting from Amendment No. 6 and any prior amendments.
- Supersede all prior proposal submissions in its entirety.

The proposal shall be submitted in two formats:

1. One (1) complete, consolidated **PDF version**, which shall constitute the official and controlling proposal; and

2. One (1) **Microsoft Word version** of the same proposal with **Track Changes enabled**, provided for evaluation and change-identification purposes only; clearly identifying all changes from the Offeror's original proposal.
3. One (1) Microsoft Excel version of the same pricing proposal template from Attachment 6.

In the event of any inconsistency between the PDF and Word versions, the PDF version shall govern.

The State will not be responsible for reconciling multiple documents, redlined submissions outside of Track Changes, or references to prior proposals. Separate addenda or partial updates will not be accepted in lieu of a complete, consolidated proposal.

## Revision 14. Change Log Requirement

As part of the submission, each Offeror shall provide a **Change Log** as a separate attachment to the proposal.

The Change Log shall clearly identify all changes, revisions, additions, deletions, and clarifications made to the Offeror's original proposal. The Change Log shall, at a minimum, include:

- Proposal section and subsection
- Page numbers
- Description of the change
- Reference to the amendment item

The Change Log is intended to assist the State in efficiently identifying and evaluating changes made pursuant to this Amendment 6 and does not replace the requirement for submission of a complete and fully updated proposal. The proposal and Change Log shall be consistent with one another. In the event of a discrepancy, the content of the proposal shall govern.

Failure to provide a Change Log that clearly and accurately identifies changes made to the original proposal may result in the Offeror being considered non-responsive.

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# Contact Information

For questions regarding this Amendment No. 6, please contact:

**Greg Dalin**

Department of Accounting and General Services

1151 Punchbowl Street, B-10

Honolulu, HI 96813

Email: [greg.b.dalin@hawaii.gov](mailto:greg.b.dalin@hawaii.gov)

Telephone: (808) 586-1865

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*End of Amendment No. 6*