

**STATE OF HAWAII
DEPARTMENT OF ACCOUNTING AND GENERAL SERVICES
ACCOUNTING DIVISION, SYSTEMS ACCOUNTING BRANCH**

RELEASE DATE: April 24, 2026

REQUEST FOR PROPOSALS

Solicitation # RFP-DAGS-SAB-26-002

ENTERPRISE FINANCIAL SYSTEM (EFS) TRANSITION READINESS SUPPORT

**OFFERS ARE DUE AT 2:00 P.M., HAWAII STANDARD TIME (HST) ON
MAY 22, 2026**

(or such later date as may be established by the State of Hawaii by an Addendum to this RFP)

BY SUBMISSION TO THE HAWAII STATE ePROCUREMENT SYSTEM (HlePRO)

DIRECT ALL QUESTIONS REGARDING THIS RFP TO:

Debby Lee, Acting Systems Accounting Manager
Telephone: (808) 830-4930 | Email: debby.lee@hawaii.gov

Alan Visitacion
Procurement Officer

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RFP Administrative Information – Offer Checklist

Offeror must address ALL sections and attachments and provide the information and documentation as required in the table below.

#	Required Item	Reference
1	Completed and signed Offer Form OF-1	Attachment A
2	Completed Offer Form OF-2 (Cost Proposal)	Attachment B
3	Executive Summary (not to exceed 1 page)	Section 9
4	Technical Approach and Methodology	Section 9.2
5	Relevant Organizational Experience	Section 9.3
6	Past Performance with minimum 3 references	Section 9.4
7	Proposed Staffing Plan with resumes	Section 9.5
8	Approach to Transition-Readiness and iPaaS Support	Section 9.6
9	Approach to Reporting and Documentation	Section 9.7
10	Cost Proposal (fixed price)	Section 9.8
11	Confidential/Proprietary Information (if applicable)	Section 12.10
12	Hawaii Compliance Express (HCE) or paper certificates	Section 12.8

Section 1: General Information

1.1 Purpose

The purpose of this solicitation is to procure specialized professional services for a one-year period to support the State's 17 Executive departments in preparing for transition to the Enterprise Financial System (EFS). The required services include two related workstreams: (1) departmental research, review, coordination, and documentation support necessary to prepare long-outstanding contracts, purchase orders, and related obligations for State closeout processing; and (2) transition-readiness, interface coordination, issue tracking, testing support, documentation, and iPaaS-related support necessary to assist the State in preparing for EFS implementation.

The State requires a Contractor with sufficient experience, staffing capacity, and technical capability to support both departmental obligation closeout readiness and broader EFS implementation readiness activities.

1.2 Background

The State is preparing for transition to the Enterprise Financial System (EFS), which requires departments to review and improve the quality, accuracy, completeness, and consistency of existing financial, procurement, asset, and related administrative records. As part of this effort, departments must identify and address outdated, incomplete, inconsistent, duplicate, invalid, or otherwise inaccurate records, including long-outstanding contracts, purchase orders, related financial records, and interface-related data or integration issues that remain unresolved beyond their appropriate period.

Due to the scale of the work, the number of departments involved, the age and condition of certain records, the complexity of interface and integration-related readiness activities, and the need to support timely EFS implementation, the State requires specialized professional services to assist departments with data review, issue identification, remediation support, closeout support, interface coordination, iPaaS-related readiness activities, documentation, status tracking, and related transition-readiness services.

Because the full volume of remediation and transition-readiness work may extend beyond the initial contract term, the State also requires the Contractor to provide planning information regarding remaining work, workload assumptions, and estimated resource needs to support future budgeting and procurement planning.

1.3 Schedule and Significant Dates

The table below contains the State's current estimate of the schedule and significant dates. All times are Hawaii Standard Time (HST). If a component of this schedule is delayed, the rest of the schedule may be shifted by the same number of days. Any change to the RFP Schedule and Significant Dates prior to the proposal due date shall be issued by addendum.

Activity	Scheduled Date
Legal Ad / Public Advertisement of RFP	April 24, 2026
Deadline for Written Questions (2:00 p.m. HST) via HlePRO	May 1, 2026
State's Response to Written Questions via HlePRO	May 7, 2026
Proposal Submittal Deadline (2:00 p.m. HST) via HlePRO	May 22, 2026
Evaluation Period	May 22 – June 1, 2026
Notice of Award	June 5, 2026
Estimated Contract Start / Notice to Proceed	June 15, 2026

1.4 Contract Type

This is a Firm-Fixed-Price contract. The Contractor shall perform all required services for a fixed total price inclusive of all labor, materials, supplies, travel, applicable taxes including Hawaii General Excise Tax (GET), and any other costs necessary to perform the services described herein. The total not-to-exceed amount for the Base Year shall not exceed \$750,000.00, inclusive of all applicable taxes including Hawaii General Excise Tax (GET). This ceiling is a firm limit and cannot be exceeded under any circumstances without a formal written amendment approved by the Procurement Officer.

1.5 Period of Performance

This contract shall be for a period of one (1) year beginning on the date specified on the Notice to Proceed. Unless terminated, the contract may be extended without re-solicitation, upon mutual agreement in writing between the State and the Contractor, prior to the expiration date, for not more than one (1) additional twelve-month period, or portion thereof. Any extension shall be subject to the availability of funds, all required approvals, and applicable law. Pricing for any work performed during the extension period shall be based on the same fixed hourly rates or pricing basis proposed by the Contractor in its Cost Proposal, unless otherwise expressly authorized in writing by the Procurement Officer through a formal contract amendment. No unilateral price increase shall be permitted during any extension period.

1.6 Point of Contact

The Accounting Division, Systems Accounting Branch is the issuing office for this document and all subsequent addenda relating to it. The reference number for this transaction is the Solicitation Number assigned in HlePRO. This number must be referred to on all proposals, correspondence, and documentation relating to this RFP.

The person identified below is the single point of contact (POC) during this procurement process. Offerors and interested persons shall direct to the POC all questions concerning the

procurement process, technical requirements, contractual requirements, changes, clarifications, and protests.

Debby Lee, Acting Systems Accounting Manager

Accounting Division, Systems Accounting Branch

Department of Accounting and General Services

1151 Punchbowl Street, Honolulu, HI 96813

Email: debby.lee@hawaii.gov

Phone: (808) 830-4930

Contract Administrator (Post-Award):

Roxanne Watanabe, Acting BTO Director

Department of Accounting and General Services

1151 Punchbowl Street, Honolulu, HI 96813

Email: roxanne.watanabe@hawaii.gov

1.7 Definitions

The following definitions apply to this solicitation:

- Contract Administrator means the person designated to manage the various facets of the contract to ensure the Contractor's total performance is in accordance with the contractual commitments and obligations are fulfilled.
- Contractor means the person or entity having a contract with a governmental body.
- EFS means the Enterprise Financial System, the State of Hawaii's enterprise financial management system modernization project.
- FAMIS means the Financial Accounting Management Information System, the State's current legacy financial system.
- iPaaS means Integration Platform as a Service, referring to iPaaS-related workflows, interfaces, and integration support activities used or planned by the State in connection with EFS implementation.
- Offeror means the company or firm that submits a proposal in response to this Request for Proposals.
- Hawaii Administrative Rules (HAR) means the adopted operating procedures for state agencies authorized by the laws of the State of Hawaii.
- Hawaii eProcurement System (HlePRO) is the State eProcurement system used for issuing solicitations, receiving responses, and issuing notices of award.
- Hawaii Revised Statutes (HRS) means the laws that govern the State of Hawaii.
- Request for Proposals or RFP means the entire solicitation document, including all parts, sections, exhibits, attachments, and Addenda.

- Subcontractor means a contractor engaged by the Prime Contractor to perform a portion of the services.

Section 2: Solicitation Information

2.1 Governing Laws and Regulations

This procurement is conducted by the Department of Accounting and General Services (DAGS), Accounting Division, Systems Accounting Branch, in accordance with the State of Hawaii Procurement Code, HRS §103D-303. Information about DAGS and its governing laws are available at <http://spo.hawaii.gov>.

This procurement shall be governed by the regulations and laws of the State of Hawaii. Venue for any administrative or judicial action relating to this procurement, evaluation, and award shall be in the State of Hawaii.

2.2 Electronic Procurement

2.2.1 The State has established the Hawaii State eProcurement (HlePRO) System to promote 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. Registration information is available at the State Procurement Office (SPO) website: <https://hiepro.ehawaii.gov/welcome.html>, select HlePRO Vendor Registration and then Vendor Registration Guide.

2.2.2 The State will use HlePRO to issue the RFP, receive Offers, and issue Addenda to the RFP. The State shall not be responsible for any person's or entity's failure to receive materials updated through HlePRO for any reason.

2.2.3 Awards made for this solicitation, if any, shall be done through HlePRO and shall be subject to a mandatory .75% (.0075) transaction fee, not to exceed \$5,000 for the total contract term.

2.2.4 HlePRO Special Instructions: Offerors shall review all special instructions located in HlePRO. Offerors are responsible for ensuring that all necessary files are attached to their offer prior to the proposal deadline. Offerors should allow ample time to review their submitted proposal, including attachments, prior to the proposal deadline. The maximum file size that HlePRO can accept is 100MB. Files larger than 100MB must be reduced into two or more files.

2.3 RFP Addenda

Changes to this RFP shall only be made via formal written addenda issued by the Accounting Division, Systems Accounting Branch. The State accepts no responsibility for a prospective

Offeror not receiving solicitation documents and/or revisions. It is the responsibility of the prospective Offeror to monitor HlePRO to obtain RFP addenda or other information relating to this RFP.

2.4 Pre-Proposal Conference

A pre-proposal conference is not scheduled for this solicitation. All questions shall be submitted through HlePRO as described in Section 2.5.

2.5 Questions Regarding RFP Contents

If a prospective Offeror believes that any provision of the RFP is unclear, potentially defective, or would prevent it from providing a meaningful Offer, the Offeror shall submit questions through HlePRO on or before the deadline shown in Section 1.3. Each question shall identify the page, section number, paragraph, and line or sentence of the provision to which the question applies. The State POC will respond by the date shown in Section 1.3. The State may issue Addenda in response to written questions received regarding the RFP. All questions must be submitted through HlePRO. Questions submitted by any other means will not be accepted.

2.6 Proposal Due Date

Proposals must be received by 2:00 p.m. HST on MAY 22, 2026 through HlePRO. Proposals received after the deadline or through any source other than HlePRO will be rejected.

2.7 Cancellation of Procurement and Proposal Rejection

The State reserves the right to cancel this RFP and to reject any and all proposals in whole or in part, and waive any defects when it is determined to be in the best interest of the State, pursuant to HAR §3-122-96 through HAR §3-122-97.

2.8 Firm Offers

Responses to this RFP, including proposed costs and/or fees, will be considered firm for sixty (60) days after the proposal due date.

2.9 Ownership of Proposals and Materials Submitted

All costs incurred by the Offeror in preparing or submitting a proposal shall be the Offeror's sole responsibility whether any award results from this RFP. The State shall not reimburse such costs. All proposals become the property of the State of Hawaii.

2.10 Additional Information

The Offeror shall provide additional information regarding aspects of an Offeror's Proposal within five (5) business days of the State's request unless the State specifies another period. Each Offeror shall submit only one Proposal. If an Offeror submits more than one Proposal, the State reserves the right to reject and/or dismiss the Offeror from the RFP process.

2.11 Payment Terms (HRS §103-10)

Pursuant to HRS §103-10, the State shall have thirty (30) calendar days after receipt of invoice or satisfactory completion of deliverables to make payment. For this reason, the State will reject any offer submitted with a condition requiring payment within a shorter period. Further, the State will reject any offer submitted with a condition requiring interest payments greater than that allowed by HRS §103-10, as amended.

2.12 Procurement Preferences

No procurement preferences, including Hawaii Product Preference (HRS §103D-1002, HAR §3-124 Subchapter 1) or Software Development Business Preference (HAR §3-124 Subchapter 5), apply to this solicitation.

Section 3: Scope of Services

The Contractor shall provide specialized professional services for a one-year period to support State departments in preparing for transition to the Enterprise Financial System (EFS). The Contractor shall furnish all personnel, supervision, project coordination, management, supplies and equipment, and related support necessary to perform the services described herein. The Contractor shall be responsible for managing its personnel and delivering the required work products and services in accordance with this solicitation and the resulting contract.

The Contractor's services shall include, but not be limited to, the following:

3.1 Closeout Support for Long-Outstanding Contracts, Purchase Orders, and Other Obligations

The Contractor shall assist departments with the research, review, analysis, coordination, and preparation of documentation needed to support the closeout of contracts, purchase orders, and other financial obligations that have remained open beyond their appropriate period.

Services may include identifying open items requiring review; researching supporting documentation; identifying missing information; coordinating with departments regarding required closeout forms, supporting records, and follow-up actions; preparing closeout support packages; documenting recommended disposition; and tracking item status through readiness for State review and processing.

To the extent necessary for research and support activities, the Contractor may be provided access to records, reports, or other information made available by the State, which may include read-only access or State-furnished extracts, as determined and authorized by the State. The Contractor shall not perform direct transaction entry, approval, or other official State actions in FAMIS or other State systems unless expressly authorized by the State.

The Contractor's role under this section shall be preparatory and support-oriented in nature. Final review, approval, and entry of closeout transactions in State systems, including FAMIS, shall remain with the State and its authorized personnel.

3.2 Financial, Procurement, Asset, and Related Records Review and Remediation Support

The Contractor shall review financial, procurement, asset, and related records to identify incorrect, incomplete, inconsistent, outdated, duplicate, invalid, unsupported, or otherwise inaccurate records affecting EFS readiness.

Services may include research of record conditions, documentation of findings, support for corrective actions, validation of updates, coordination with departments and other authorized stakeholders, and tracking of unresolved items requiring further State action.

3.3 Data Standardization and Validation

The Contractor shall assist with standardizing and validating departmental financial, procurement, asset, and related records to improve consistency, completeness, accuracy, and readiness for EFS implementation.

Services may include identification of missing, conflicting, incomplete, or nonstandard information; support for corrective actions; validation of record updates; documentation of assumptions, business rules, and resolutions; and tracking of items pending further review or decision.

3.4 Transition-Readiness, Interface Coordination, and iPaaS-Related Support

For purposes of this solicitation, iPaaS means Integration Platform as a Service and refers to iPaaS-related workflows, interfaces, and integration support activities used or planned by the State in connection with EFS implementation.

The Contractor shall provide specialized professional services to support departmental and enterprise transition-readiness activities associated with EFS implementation, including coordination, analysis, documentation, issue identification, follow-up, and resolution tracking related to interfaces, integration dependencies, data mapping, data validation, iPaaS-related workflows, and testing support, in accordance with the State's EFS implementation requirements and authorized project direction.

Services may include:

- identifying interface-related data issues, dependencies, risks, and gaps affecting transition readiness;
- supporting review of source-to-target data requirements, mapping assumptions, data-standardization needs, and validation requirements;
- coordinating with departments, project teams, and other authorized stakeholders regarding interface requirements, integration dependencies, readiness activities, and issue resolution;
- documenting business rules, assumptions, issues, gaps, dependencies, and recommended corrective actions related to interfaces and iPaaS-related processes;
- supporting testing preparation, test data readiness, issue tracking, and validation activities related to interfaces and iPaaS-enabled workflows; and
- preparing status reports, issue logs, coordination materials, and related work products necessary to support transition readiness and implementation coordination.

3.5 Departmental Coordination and Issue Resolution Support

The Contractor shall work directly with designated departmental personnel and other authorized stakeholders to gather information, analyze issues, support remediation and closeout activities, document findings, track dependencies, and support timely completion of required cleanup, validation, interface, and readiness activities.

3.6 Status Tracking and Reporting

The Contractor shall maintain appropriate status tracking and provide regular written progress updates identifying work completed, work in progress, pending items, unresolved issues, risks, dependencies, escalations, and recommended next steps or corrective actions.

3.7 Knowledge Transfer and Documentation

The Contractor shall document methodologies, assumptions, business rules, issues, resolutions, dependencies, recommendations, and other work products necessary to support continuity, reference, and transition to State personnel and the EFS project.

3.8 Other Related Services

The Contractor may be required to perform additional services that are clearly incidental and directly related to the services expressly described in this solicitation, provided such services are within the general scope of this procurement and do not materially expand the scope of work, alter the nature of the procurement, or introduce substantially new requirements not reasonably contemplated by this solicitation. Any such services shall be performed only upon written authorization by the State and in accordance with the terms of the contract.

Section 4: State Authority

The Contractor shall provide research, analysis, coordination, documentation, recommendations, and administrative or project support in connection with the services described herein. Final decisions regarding record correction, closeout, disposition, write-off, data acceptance, business rule approval, technical design, system configuration, production approval, system entry, or other official State action shall remain with the State and its authorized personnel.

Section 5: Deliverables

The Contractor shall provide deliverables sufficient to support departmental and enterprise readiness for transition to EFS, including, but not limited to, the following:

5.1 Project Work Plan and Schedule

A written work plan and schedule identifying major tasks, milestones, workstreams, staffing approach, reporting approach, dependencies, and anticipated timelines for completion of services.

5.2 Open Obligation Closeout Support Documentation

Tracking records, closeout support packages, and other written documentation reflecting items reviewed, research performed, supporting information identified, department coordination completed, required forms or follow-up actions identified, recommended disposition, and status of items pending State review, approval, or system entry.

5.3 Departmental Data Assessments

Written assessments, by department, workstream, or other State-directed grouping, identifying the record categories reviewed, issues identified, risk areas, recommended corrective actions, and unresolved items requiring further review or action.

5.4 Data Remediation, Standardization, and Validation Documentation

Logs, reports, or other written work products identifying records reviewed, issues identified, corrective actions recommended or supported, standardization actions, validation results, assumptions used, and unresolved items.

5.5 Transition-Readiness, Interface, and iPaaS Support Documentation

Issue logs, mapping support materials, coordination records, readiness documentation, testing support materials, assumptions, dependency tracking records, and related work products associated with transition-readiness, interface coordination, and iPaaS-related support activities.

5.6 Status Reports

Regular written status reports, at minimum monthly unless otherwise directed by the State, identifying work completed, work in progress, pending items, unresolved issues, risks, dependencies, items requiring escalation or State action, and planned next steps.

5.7 Knowledge Transfer and Reference Documentation

Written documentation of methodologies, assumptions, business rules, issues, resolutions, lessons learned, and other work products necessary to support continuity and transition to State personnel and the EFS project.

5.8 Final Summary and Transition Documentation

A final written summary of services performed, work products completed, key issues identified, unresolved items, recommendations, and documentation necessary to support continuity and next-phase planning.

5.9 Phase 2 Implementation Roadmap and Planning-Level Cost Estimate

A final deliverable for the initial contract term documenting the remaining volume of records, unresolved issues, and activities that may require additional remediation or transition support beyond the initial term, together with a planning-level staffing approach and cost estimate for budgeting and future procurement planning purposes, if requested by the State.

This deliverable is for planning purposes only. Participation in this contract does not guarantee, nor preclude, eligibility for any future related procurement. Any future work beyond the initial contract term shall be subject to the availability of funds, required approvals, and applicable procurement requirements.

Section 6: Minimum Qualifications

To be considered for award, the Offeror shall demonstrate the following minimum qualifications:

- At least three (3) years of experience providing financial, procurement, asset, or related records review, analysis, reconciliation, remediation support, validation, or similar professional services;
- Experience on at least two (2) projects within the last five (5) years involving enterprise system implementation readiness, transition readiness, interface coordination, integration support, data mapping or validation support, testing support, issue tracking, or iPaaS-related workflow or integration activities;
- Experience involving research, review, coordination, documentation, or closeout support for long-outstanding contracts, purchase orders, obligations, or related financial or administrative records;
- Experience performing work in at least one (1) public-sector, governmental, or other large and complex organizational environment; and
- Demonstrated ability to deliver written reporting, issue tracking, documentation, knowledge transfer, and professionally managed work products throughout the contract term.

Failure to meet the minimum qualifications shall render the Offeror non-responsive and ineligible for further evaluation.

6.6 Subcontractor Requirements

The Subcontractors providing services shall meet the same service requirements and provide the same quality of service required of the Contractor and in a timely manner. No subcontract shall relieve the Contractor of its responsibilities for the services it provides. The Contractor shall manage the quality and performance, project management and schedules, and timely start and completion of services performed by each of its Subcontractors. The Contractor shall be solely responsible and accountable for the completion of all services it has subcontracted.

In addition to any rights the State has under law, the State shall have the right to require the removal of a Subcontractor or any of its personnel for good cause. A Subcontractor proposed by the Contractor to replace a removed Subcontractor shall be subject to the approval of the State.

The State shall have the right to directly retain any Subcontractor after the expiration, termination, or suspension of the contract under which it is retained.

Section 7: Desirable Qualifications

The following qualifications are desirable and will be considered in the evaluation of proposals, but are not required:

- Experience with State of Hawai'i financial, procurement, asset, administrative, or related records, systems, and processes;
- Experience supporting large-scale enterprise system implementation, modernization, or transition-readiness efforts;

- Experience supporting cross-department coordination involving data cleanup, obligation closeout readiness, interfaces, integration dependencies, testing readiness, or iPaaS-related activities; and
- Experience working in environments requiring coordination between business, financial, operational, and technical stakeholders.

Section 8: Key Personnel / Proposed Staffing

The Offeror shall propose a staffing approach sufficient to perform the required services within the contract term. The proposal shall identify proposed key personnel, labor categories, relevant qualifications, responsibilities, and level of effort necessary to perform the work.

The proposed staffing approach shall demonstrate the Offeror's ability to provide qualified personnel with expertise in one or more of the following areas, as applicable to the services proposed:

- Project coordination, work planning, progress monitoring, and status reporting;
- Financial, procurement, asset, and related records review, reconciliation, remediation support, validation, and documentation;
- Research, review, coordination, and preparation of closeout support documentation for long-outstanding contracts, purchase orders, and related obligations;
- Departmental coordination, issue identification, records research, documentation, and readiness support;
- Data standardization, validation, issue tracking, and corrective action support;
- Transition-readiness, interface coordination, integration dependency tracking, issue resolution support, testing support, data mapping or validation support, and iPaaS-related workflow support; and
- Knowledge transfer, continuity documentation, and preparation of final work products.

The State reserves the right to review and approve key personnel assigned to the contract and to require replacement of personnel whose performance, qualifications, or availability are not acceptable to the State. Any replacement personnel shall possess qualifications and experience substantially equivalent to or better than those originally proposed for the applicable role.

Section 9: Proposal Content Requirements

To allow for fair and consistent evaluation, all proposals shall be submitted in the following format. Each proposal must be labeled and organized in a manner that is congruent with the requirements and terminology used in this RFP. Proposals shall be submitted in 12-point Arial font or equivalent and shall not exceed fifty (50) pages excluding the Offer Forms and attachments.

9.1 Executive Summary (not to exceed 1 page)

A brief summary highlighting the major features of the proposal and demonstrating the Offeror's understanding of and ability to meet the requirements of this RFP. The State should be able to determine the essence of the proposal by reading the executive summary. The executive summary will not be evaluated for points.

9.2 Technical Approach and Methodology

A description of the Offeror's technical approach and methodology for performing the services described in this solicitation, including its approach to:

- closeout support for long-outstanding contracts, purchase orders, and related obligations;
- records review, issue identification, remediation support, and validation;
- data standardization and readiness support;
- transition-readiness, interface coordination, testing support, and iPaaS-related activities;
- departmental coordination, issue tracking, and status reporting; and
- documentation, knowledge transfer, and continuity support.

9.3 Experience and Qualifications of the Offeror

A description of the Offeror's relevant experience, including project examples demonstrating work similar in scope, complexity, or subject matter to the services requested under this solicitation.

9.4 Past Performance

A description of the Offeror's past performance on projects of similar scope for public agencies or private industry, including project examples, client names, dates of service, a description of services performed, and contract references. The Offeror shall provide a minimum of three (3) references from clients that received services similar to those described in this solicitation. The State reserves the right to conduct reference checks beyond those provided by the Offeror. Full points for past performance will not be awarded without confirmation of services from at least three (3) listed clients.

9.5 Qualifications and Capacity of Proposed Personnel and Staffing Approach

A staffing plan identifying proposed key personnel, labor categories, roles, qualifications, responsibilities, and level of effort necessary to perform the work. Resumes of key personnel shall be included. The Offeror shall also describe its overall staffing capacity, labor mix, supervision approach, and ability to deliver all required work products within the contract term. This section corresponds to Evaluation Criteria 10.4 and 10.5.

9.6 Approach to Transition-Readiness, Interface Coordination, and iPaaS Support

A description of the Offeror's approach to supporting transition-readiness activities, interface coordination, integration dependencies, issue tracking, testing support, data mapping or validation support, and iPaaS-related workflow or integration activities.

9.7 Approach to Reporting and Documentation

A description of the Offeror's approach to status tracking, issue reporting, preparation of work products, knowledge transfer, and final documentation.

9.8 Cost Proposal

The Offeror shall submit a fixed price cost proposal using Offer Form OF-2 (Attachment B). The proposed price shall represent the total not-to-exceed amount for the base year and, separately, for the option year if exercised. The proposed price shall be inclusive of all labor, materials, supplies, travel, applicable taxes including Hawaii General Excise Tax (GET), and any other costs necessary to perform the required services.

The Offeror shall submit pricing for the base year and option year using Offer Form OF-2 (Attachment B). The Offeror shall also submit fully loaded hourly rates by labor category as part of the OF-2 form. If the option period is exercised or the scope is expanded within the general scope of this procurement, compensation shall be based on the same rates and pricing basis proposed by the Offeror, unless otherwise expressly approved in writing by the Procurement Officer through a formal contract amendment. Proposals with a Base Year cost exceeding \$750,000.00 inclusive of all applicable taxes including Hawaii General Excise Tax (GET) shall be deemed non-responsive and will not be considered for award.

The Offeror shall provide a brief narrative describing the basis for the proposed price, including staffing approach, estimated level of effort, and key assumptions.

9.9 Confidential, Protected, or Proprietary Information

All confidential, protected, or proprietary information must be clearly identified and submitted in a separate section of the proposal. Price is not considered confidential and shall not be withheld from public disclosure. Information identified as confidential is not automatically accepted as protected and will be subject to review by the State in accordance with HRS Chapter 92F.

9.10 Each Offeror to Bear its Own Costs

Each Offeror shall be responsible for all costs incurred by it prior to the Notice of Award, including, without limitation, its costs of preparing and submitting its Offer, responding to

notices or requests, making Priority-Listed Offeror presentations, demonstrations, and discussions, and otherwise participating in the RFP Process.

Section 10: Proposal Evaluation Criteria

Proposals will be evaluated based on the following criteria. The evaluation committee shall consist of at least three (3) qualified State employees selected by the Procurement Officer.

Evaluation Criteria	Maximum Points
10.1 Technical Approach and Understanding of the Work	25
10.2 Experience and Qualifications of the Offeror	20
10.3 Past Performance	20
10.4 Qualifications and Suitability of Proposed Personnel	20
10.5 Capacity and Proposed Staffing Approach	5
10.6 Cost Proposal	10
TOTAL	100

10.1 Technical Approach and Understanding of the Work – 25 points

The extent to which the Offeror demonstrates a clear, workable, and well-organized methodology for performing the required services, including: closeout support for long-outstanding contracts, purchase orders, and related obligations; records review, issue identification, remediation support, and validation; data standardization and readiness support; transition-readiness activities; interface coordination, integration dependency support, testing support, and iPaaS-related activities; and reporting, documentation, issue tracking, and knowledge transfer.

10.2 Experience and Qualifications of the Offeror – 20 points

The Offeror's demonstrated experience in providing similar specialized professional services involving financial, procurement, asset, or related records review; research and preparation of closeout support documentation; data analysis and remediation support; transition-readiness work; interface coordination; integration support; testing support; iPaaS-related activities; or similar enterprise implementation support, particularly in public-sector, governmental, or other large and complex organizational environments.

10.3 Past Performance – 20 points

The Offeror's past performance on projects of similar scope for public agencies or private industry, including the quality of services performed, timeliness, responsiveness, effectiveness of project management, success in delivering required work products, and record of performance on comparable engagements.

10.4 Qualifications and Suitability of Proposed Personnel – 20 points

The relevant education, training, certifications, experience, and directly related qualifications of the personnel proposed to perform the work, including experience in records review, closeout support, data remediation, documentation, issue resolution, departmental coordination, transition-readiness support, interface coordination, testing support, and iPaaS-related activities, as applicable.

10.5 Capacity and Proposed Staffing Approach – 5 points

The extent to which the Offeror's proposed staffing approach demonstrates adequate personnel, labor mix, organization, supervision, level of effort, and overall capacity to perform the required services and deliver the required work products within the contract term.

10.6 Cost Proposal – 10 points

Cost shall be evaluated using the following formula:

$$(\text{Lowest Cost Proposal} \times \text{Maximum Points for Cost}) \div \text{Offeror's Cost Proposal} = \text{Cost Score}$$

The maximum points for cost is 10. The proposal with the lowest cost shall receive the maximum score of 10 points. Higher-priced proposals shall receive proportionately lower scores based on the formula above. Note: Proposals with a Base Year cost exceeding \$750,000.00 inclusive of GET shall be deemed non-responsive and will not receive a cost score.

Example:

If the maximum points for cost is 10 and the following proposals are received:

Offeror	Proposed Cost	Calculation	Cost Score
Offeror A	\$500,000	Lowest — receives maximum points	10.0
Offeror B	\$625,000	$(\$500,000 \times 10) \div \$625,000$	8.0
Offeror C	\$750,000	$(\$500,000 \times 10) \div \$750,000$	6.7

10.6.1 Price Reasonableness

Prices shall be evaluated for competitiveness and reasonableness of price. The State may use any or all price analysis techniques and procedures to determine price reasonableness.

10.6.2 Price Realism

The State may use any or all price realism techniques and procedures for the purpose of measuring an Offeror's understanding of the solicitation requirements, or of assessing the risk inherent in an Offeror's proposal. Price quotes that are determined to be insufficient or unreasonable in relation to the proposed scope of work, staffing approach, and deliverables will not receive full points and may be disqualified from further evaluation.

10.7 Priority-Listed Offerors

The evaluation committee will evaluate all proposals submitted by the proposal due date. If more than three (3) proposals are received, the evaluation committee shall establish a priority list of no fewer than three (3) Offerors submitting the highest-ranked proposals. If three (3) or fewer proposals are received, all responsive and responsible Offerors shall be considered Priority-Listed Offerors. The evaluation committee may conduct discussions with Priority-Listed Offerors prior to requesting Best and Final Offers, if applicable.

10.8 Best and Final Offer (BAFO)

The State, in its sole discretion, may request each Priority-Listed Offeror to submit a Best and Final Offer (BAFO). If a BAFO is requested, the State will establish a deadline and provide additional instructions via addendum through HlePRO. If a Priority-Listed Offeror does not submit a BAFO by the established deadline, its last submitted proposal shall be deemed its BAFO. The State reserves the right to make an award without requesting a BAFO if the initial proposals are determined to be sufficient for evaluation and award.

10.9 Award of Contract

Award shall be made to the responsible Offeror whose proposal is determined to be most advantageous to the State, taking into consideration price and the other evaluation factors set forth in this RFP. No other factors or criteria shall be used in the evaluation. The contract file shall contain the basis on which the award is made.

10.10 Notice of Award

After a final selection is made, the State will issue a notice of award on HlePRO. Upon award, proposal files are public records available for review by submitting a Request for Access to Government Records.

10.11 Debriefing

Pursuant to HAR §3-122-60, a non-selected Offeror may request a debriefing to understand the source selection decision and contract award. A written request for debriefing shall be made within three (3) working days after the posting of the award. The Procurement Officer or designee shall hold the debriefing within seven (7) working days to the extent practicable from receipt of the written request. A protest following debriefing shall be filed within five (5) working days as specified in HRS §103D-303(h).

Section 11: Contract Management

11.1 Contract Administrator

The Contract Administrator identified below is the single point of contact post-award. The Contractor shall direct to the Contract Administrator all questions concerning post-award activities and any other questions related to the resulting contract.

Roxanne Watanabe, Acting BTO Director

Department of Accounting and General Services

Accounting Division, Systems Accounting Branch

1151 Punchbowl Street, Honolulu, HI 96813

Email: roxanne.watanabe@hawaii.gov

11.2 Contractor/State Meetings

The Contractor shall participate in initial meetings with the State to discuss the contract, including an estimated timeline for transition and implementation, status reports, the expectation of deliverables, and follow-up meetings as directed by the State.

11.3 Dispute Process and Escalation

Any disputes arising under this contract shall first be addressed by the Contractor and the Contract Administrator. If the dispute cannot be resolved at that level, it shall be escalated to the Procurement Officer. In the event of a dispute, the parties shall first attempt to resolve the issue through informal negotiations before escalating to the formal procedures outlined in HRS

§103D-703. Disputes shall be resolved in accordance with HRS §103D-703 and HAR Chapter 3-126.

11.4 Quality Control

The Contractor shall provide quality services and management oversight of all processes. The Contractor shall provide accurate data, reports, and deliverables with emphasis on the overall success of the EFS transition readiness effort. The Contractor shall provide management, support, and qualified personnel to accomplish the objectives of this contract.

11.5 Post-Award Deliverables

The Contractor shall provide all deliverables described in Section 5 in accordance with the approved Project Work Plan and Schedule. All deliverables shall be subject to State review and acceptance. The Contractor shall revise any deliverable deemed unsatisfactory by the State within a timeframe specified by the Contract Administrator.

Section 12: Special Provisions

12.1 Intellectual Property Rights

The State shall have complete ownership of all material, both finished and unfinished, which is developed, prepared, assembled, or conceived by the Contractor pursuant to this contract, and all such material shall be considered works made for hire. All such material shall be delivered to the State upon expiration or termination of the contract. The State, in its sole discretion, shall have the exclusive right to copyright any product, concept, or material developed pursuant to this contract.

12.2 No Performance or Payment Bond Required

No performance or payment bond is required for this contract.

12.3 Notice to Proceed

Work will commence on the official commencement date specified on the Notice to Proceed. No work is to be undertaken by the Contractor prior to the commencement date. The State of Hawaii is not liable for any work, contract, costs, expenses, loss of profits, or any damages whatsoever incurred by the Contractor prior to the official starting date.

12.4 Contract Execution

The successful Offeror receiving award shall enter into a formal written contract to be signed by the Contractor and returned within ten (10) working days of receipt. If an option to extend is mutually agreed upon, the Contractor shall be required to execute a supplemental contract for the additional extension period.

12.5 Liability Insurance

Prior to the contract start date, the Contractor shall procure, at its sole expense, and maintain insurance coverage in full force and effect throughout the term of the contract. The Contractor shall provide proof of insurance prior to award for the following minimum insurance coverage(s) and limit(s):

- a. Commercial General Liability Insurance covering claims for bodily injury and property damage arising out of all operations by the Contractor, its employees, and subcontractors. Minimum limits: \$1,000,000 per occurrence; \$2,000,000 aggregate. The policy shall be written on an occurrence basis.
- b. Automobile Liability Insurance covering owned, non-owned, leased, and hired vehicles. Minimum limits: \$1,000,000 combined single limit per accident.
- c. Workers' Compensation Insurance as required by State law, and Employers' Liability Insurance with minimum limits of \$100,000 per occurrence.
- d. Professional Liability (Errors and Omissions) Insurance covering all professional services performed under this contract. Minimum limits: \$5,000,000 per claim; \$10,000,000 aggregate.
- e. Cyber Liability Insurance with limits not less than \$5,000,000 per occurrence/claim; \$10,000,000 aggregate. Coverage shall include information theft, damage to or destruction of electronic information, release of private information, and network security breaches.

All required insurance shall be carried with insurance carriers rated no less than A-VII in the most current A.M. Best's Insurance Reports. The State of Hawaii shall be named as an additional insured on all policies except Professional Liability and Workers' Compensation. All policies shall provide thirty (30) days written notice to the State prior to cancellation, lapse, or material reduction in coverage. Upon execution of the contract, the Contractor shall deposit certificate(s) of insurance with the State and shall maintain such certificates on deposit throughout the entire term of the contract.

Note: These are standard minimum insurance requirements. Offerors should verify final requirements with the Contract Administrator prior to contract execution, as Risk Management may require adjustments based on the specific nature of services performed.

12.6 Contract Invalidation

If any provision of this contract is found to be invalid, such invalidation will not be construed to invalidate the entire contract.

12.7 Certification Concerning Wages, Hours and Working Conditions

All Offerors for service contracts shall comply with HRS §103-55, which requires that services to be performed under contracts in excess of \$25,000 shall be performed by employees paid at wages or salaries not less than the wages paid to public officers and employees for similar work, and in compliance with all applicable federal and State labor laws.

12.8 Responsibility of Offerors / Hawaii Compliance Express (HCE)

The Offeror is advised that in order to be awarded a contract under this solicitation, the Offeror will be required to be compliant with all laws governing entities doing business in the State of Hawaii pursuant to HRS §103D-310(c), including:

- Chapter 237, General Excise Tax Law;
- Chapter 383, Hawaii Employment Security Law;
- Chapter 386, Workers' Compensation Law;
- Chapter 392, Temporary Disability Insurance;
- Chapter 393, Prepaid Health Care Act; and
- §103D-310(c), Certificate of Good Standing (COGS) for entities doing business in the State.

Vendors may use the Hawaii Compliance Express (HCE), an electronic system that allows vendors doing business with the State to quickly and easily demonstrate compliance with applicable laws. Registration is available at <https://vendors.ehawaii.gov>. The annual registration fee is \$12.00. A vendor must be compliant with HRS 103D-310(c) upon award.

12.9 Tax Liability

Work to be performed under this solicitation is a business activity taxable under HRS Chapter 237. Offerors are advised that they are liable for Hawaii General Excise Tax (GET) at the applicable rate. If an Offeror is exempt from GET, the Offeror shall state its tax-exempt status and cite the applicable HRS chapter or section.

12.10 Confidentiality

If an Offeror in good faith considers a portion of its Offer to contain confidential, protected, or proprietary information, it shall follow the procedures set forth in Section 9.9. Costs included in an Offer, including Total Cost proposals, cannot be confidential and will not be withheld from public access. Offerors shall not mark any pricing information as confidential or proprietary.

The State will consult with the Attorney General regarding any Offeror's request for confidentiality pursuant to HAR §3-122-58.

12.11 Protest Procedures

Pursuant to HRS §103D-701 and HAR §3-126-3, an actual or prospective Offeror who is aggrieved in connection with the solicitation or award of a contract may submit a protest. Any protest shall be submitted in writing to the Procurement Officer at:

Alan Visitacion, Procurement Officer

Accounting Division, Systems Accounting Branch

Department of Accounting and General Services

1151 Punchbowl Street, Honolulu, HI 96813

Email: alan.i.visitacion@hawaii.gov

A protest shall be submitted in writing within five (5) working days after the aggrieved person knows or should have known of the facts giving rise thereto; provided that a protest based upon the content of the solicitation shall be submitted prior to the date set for receipt of offers; and provided further that a protest of an award or proposed award shall be submitted within five (5) working days after the posting of the award or, if requested, within five (5) working days after the debriefing is completed.

12.12 Mistakes in Proposals

Mistakes shall not be corrected after awarding of the contract. When the Procurement Officer knows or has reason to believe that a mistake has been made, the Procurement Officer may request the Offeror to confirm the proposal. If discussions are not held, or if the best and final offers upon which award will be made have been received, mistakes shall be corrected to the intended correct offer whenever the mistake and the intended correct offer are clearly evident on the face of the proposal.

12.13 Modification or Withdrawal of Offers

The Offeror may modify or withdraw a proposal before the proposal due date and time. Any change, addition, or deletion of an Offer may be made prior to the deadline for submittal of offers through HlePRO.

12.14 Contract Changes – Unanticipated Amendments

During the course of the contract, the Contractor may be required to perform additional work which shall be within the general scope of the initial contract. When additional work is required,

the Contract Administrator will provide the Contractor a written description of the additional work and request the Contractor to submit a firm time schedule and price for the additional work. The Contractor will not commence additional work until an executed written contract amendment has been issued.

12.15 General Conditions

The successful Offeror shall comply with all applicable federal, state, and county laws, rules, and regulations, and shall satisfy all requirements for doing business in the State of Hawai'i. Any contract arising from this solicitation shall be subject to the availability of funds, all required approvals, and the terms and conditions of the final contract including the AG-008 103D General Conditions attached hereto as Exhibit 1.

ATTACHMENT A

STATE OF HAWAII
DEPARTMENT OF ACCOUNTING AND GENERAL SERVICES
ACCOUNTING DIVISION, SYSTEMS ACCOUNTING BRANCH

ATTACHMENT 1 – PROPOSAL FORM OF-1

RFP No. RFP-DAGS-SAB-26-002

ENTERPRISE FINANCIAL SYSTEM (EFS) TRANSITION READINESS SUPPORT

Head of Purchasing Agency:

Department of Accounting and General Services
 Accounting Division, Systems Accounting Branch
 1151 Punchbowl Street, Honolulu, HI 96813

Dear Sir/Madam:

The undersigned has carefully read and understands the terms and conditions specified in this RFP and hereby submits the following proposal to perform the work specified in the RFP.

The undersigned further understands and agrees that by submitting this proposal: (1) he/she is declaring his/her proposal is not in violation of Chapter 84, Hawaii Revised Statutes, concerning prohibited State contracts; and (2) he/she is certifying that the price(s) submitted was (were) independently arrived at without collusion.

Date:	Telephone No.:
	Fax No.:
Respectfully submitted,	E-mail Address:
	Exact Legal Name of Offeror:
Authorized Signature (Original):	
	Street Address:
Print Name:	
Title:	City, State, Zip Code:
Hawaii General Excise Tax License I.D. No.:	Social Security or Federal I.D. No.:

If OFFEROR shown above is a 'dba' or a 'division' of a corporation, furnish the exact legal name of the corporation under which the contract, if awarded, will be executed:

OFFEROR is: Individual Partnership Corporation Joint Venture Other (specify):

State of incorporation: Hawaii Other (specify jurisdiction): _____

ATTACHMENT B

STATE OF HAWAII
DEPARTMENT OF ACCOUNTING AND GENERAL SERVICES
ACCOUNTING DIVISION, SYSTEMS ACCOUNTING BRANCH

ATTACHMENT 2 – PROPOSAL FORM OF-2

COST PROPOSAL

RFP No. RFP-DAGS-SAB-26-002

ENTERPRISE FINANCIAL SYSTEM (EFS) TRANSITION READINESS SUPPORT

The following fixed price proposal is submitted for the above referenced RFP. The proposed price shall be the total not-to-exceed amount for all services described in the Scope of Work. No other request for payment shall be honored. The Contractor shall be responsible for all taxes, fees, licenses, insurance, travel, and other costs necessary to perform the required services.

Period / Description	Fixed Price (Not-to-Exceed)
Base Year – 12 months from Notice to Proceed Includes all services described in Scope of Work (Sections 3.1 through 3.8) MAXIMUM NOT-TO-EXCEED: \$750,000.00 inclusive of GET Proposals exceeding this ceiling shall be deemed non-responsive.	\$
Option Year – 12 additional months (if exercised by the State) Includes continued or additional transition-readiness support services within the general scope of this procurement. Exercise of the Option Year is at the sole discretion of the State and is subject to: (1) satisfactory completion of ALL Base Year deliverables; (2) availability of funds; and (3) all required approvals. Pricing shall be based on the same hourly rates proposed in the Base Year. The Option Year is NOT intended to cover incomplete Base Year work.	\$
TOTAL NOT-TO-EXCEED (Base Year + Option Year)	\$

Note: Pricing shall be inclusive of all labor, materials, supplies, travel, applicable taxes including Hawaii General Excise Tax (GET), and any other costs necessary to perform the services described herein. Base Year pricing shall not exceed \$750,000.00 inclusive of GET — proposals exceeding this ceiling shall be deemed non-responsive. The Option Year is not intended to cover work that was not completed during the Base Year. All Base Year deliverables must be completed within the Base Year period and budget. Option Year pricing shall be based on the same hourly rates proposed for the Base Year.

Cost Narrative

The Offeror shall provide a brief narrative below describing the basis for the proposed price, including staffing approach, estimated level of effort, key assumptions, and any other information relevant to understanding the proposed cost:

--

Staffing Summary

The Offeror shall provide a summary of proposed staffing below. This information is for evaluation purposes only and does not constitute a fixed staffing plan.

Labor Category	Staff Name(s)	Est. Hours (Base Year)	Est. Hours (Option Year)
TOTAL			

The Offeror acknowledges that payment will be made based on deliverables accepted by the State as described in Section 4 of this solicitation.

Authorized Signature:	Date:
Print Name:	Title:
Company Name:	