

AMENDMENT 2

May 27, 2026

The State of Hawaii

Department of Accounting and General Services

Office of Enterprise Technology Services

Request for Proposals

Solicitation - RFP-26-100

INDEPENDENT VERIFICATION & VALIDATION (IV&V) SERVICES FOR THE ENTERPRISE FINANCIAL SYSTEM PROJECT

This Amendment 2 serves to make the following changes to **RFP-26-100**:

- I. **Section 4.6 Project Deliverables, Artifacts table p. 27.** The IV&V Project Management Plan Delivery Date has been amended to now read:

Deliverable	Description	Delivery Date
IV&V Project Management Plan	Provide a comprehensive plan describing IV&V tasks and activities and interdependencies, personnel, resources, milestones, deliverables, proposed payment schedule, and acceptance criteria. Also describe standards and methodology for conducting IV&V reviews. This plan will be refined as necessary to align with approved changes to other applicable plans within the project and will include a table including narrative descriptions of all IV&V activities, deliverables and proposed associated payment amounts, including expected format, content, and organization, to be developed and delivered during the base period (12 months).	Within 30 business days after contract Notice to Proceed date and ongoing.

All other portions of the table remain unchanged.

- II. **Published Answers to Submitted Questions on HIEPRO for solicitation: P26002720 INDEPENDENT VERIFICATION & VALIDATION (IV&V) SERVICES FOR EFS, are hereby incorporated into and made part of this RFP (note: subsequent to the publishing of answers on HIEPRO, the Offeror proposal due date and IV&V Project Management Plan due date of the RFP have been amended):**

1. The due date listed in the documents and on HiePro is Saturday, May 23rd, 2pm HST. Is that correct?

The stated due date and time is correct. However, the State is considering extending the deadline, and any changes to the proposal due date and time will be made via an Amendment published on HIEPRO – so offerors are encouraged to monitor.

2. Is it possible to receive a two week extension?

A two-week extension to the listed due date and time for proposal submittals will not be granted. However, the State is considering extending the deadline, and any changes to the proposal due date and time will be made via an Amendment published on HIEPRO – so offerors are encouraged to monitor.

3. The current due date for Solicitation RFP-26-100 is May 23, 2026, which falls on the Saturday of Memorial Day weekend. Would the State consider revising the due date to Friday, May 29? Thank you for your consideration.

The State is considering extending the proposal due date deadline, and any changes to the proposal due date and time will be made via an Amendment published on HIEPRO – so offerors are encouraged to monitor.

4. As stated on page 30 of the RFP, does the IV&V vendor team need a person with “experience with configuration and implementation of the EFS project proposed enterprise financial management solution (Workday) for organizations of comparable size and complexity to Hawaii”? This seems to be a role that would be reserved for the implementation or integration contractor, not the IV&V contractor. Please advise.

The State is seeking Offeror staff experience with configuration and implementation of the EFS project proposed enterprise financial management solution (Workday) for organizations of comparable size and complexity to Hawaii. Also, see answers to Questions 13 and 15.

5. Would the State please share the name of its planned system integrator?

An intent to award has been made to the system integrator, Guidehouse. See: <https://hiepro.ehawaii.gov/public-display-award.html?fromAwardSearch=1&rfid=18368>

6. Would the State please share an overall planned timeline for the system implementation, such as planned release date(s)?

The following represents the current estimated timeline for the EFS implementation project (dates subject to change): 1) Project Start: Oct 2026; 2) Discovery / Base Camp: Oct 2026 – Feb 2027; 3) Planning: Mar 2027 – Jul 2027; 4) Configuration & Build: Aug 2027 – Feb 2028; 5) Testing: Mar 2028 – Jun 2028; 6) Phase 1 Go-Live: Aug/Sep 2028; 7) Phase 1 Hypercare: Sep 2028 – Feb 2029; 8) Phase 2 Execution: Dec 2028 – Jul 2030; 9) Final Acceptance: Jul 2030; 10) Post-Production Support: Aug 2030 – Oct 2033

7. Would the State please provide the list of Workday SKUs it expects to implement? This will help us more effectively identify resource skillsets/backgrounds to include on our proposed team.

The following is the current anticipated list of Workday SKUs and services that will be in use for the EFS implementation project (subject to change): FIN - Core Financials; GM - Grants Management; ACC - Accounting Center; PRA - Prism Analytics Enterprise; PRJT – Projects; INV – Inventory; PRO – Procurement; XTND - Extend Professional; EXPM - Expense Management; WSP - Workday Success Plan; CHCM - Core Human Capital Management (limited use only). Additionally, the following additional vendor solutions are part of the overall project scope above: Workiva, Euna Grants, and Sympro.

8. Would the state please provide the list of planned milestones? This information is needed to understand how many “Pre Go-Live Implementation Milestone Reports” and “Post Go-Live Implementation Milestone Report” the selected vendor will be required to complete.

See answer to Question 6.

9. Does the State require that payment milestone correspond to the deliverables listed in the RFP?

Yes - The State is requesting all Offerors submit, as an attachment, a proposed breakdown of the contract cost by deliverables for the base year, based on requirements in Section 4.6 Project Deliverables, Artifacts. These proposed amounts should align with the Price Proposal Form (Attachment 2). Note that payments for Weekly Status Reports should be rolled into the deliverable payments for the Monthly Status Reports and Executive Sponsor Briefings.

10. Would the State please consider a one-week extension for the proposal due date? This would help bidders adjust their proposals in accordance with answers received and accommodate Memorial Day.

The State is considering extending the proposal due date deadline, and any changes to the proposal due date and time will be made via an Amendment published on HIEPRO – so offerors are encouraged to monitor.

11. Will the State allow for “Weekly Status Report” deliverable to be merged with the “Monthly Status Reports and Executive Sponsor Briefings” for payment milestone and invoicing purposes? This will save the State from needing to approve deliverables and process invoices every week.

Yes – payments for the weekly status reports deliverables should be included and accounted for in the monthly status reports and executive sponsor briefings for invoicing and payment.

12. Would the State please clarify its definition for who qualifies as a “senior member” of our proposed team for which work experience, references, availability, etc. should be provided?

Clarification: Offeror “senior member(s)”, “key personnel”, or “key team members” are defined as any proposed personnel, member, or staff of the Offeror, including subcontractors, assigned to perform services described in Section 4. Scope of Work of the RFP.

13. 1. Section 7.2.1 states that Staff Qualifications (25 points) will be scored based on Section 5.2, and Section 7.2 defines a five-tier scoring framework. However, no rubric maps specific Section 5.2 qualifications (e.g., PMP certification, Workday experience, years of IV&V experience) to scoring tiers. Will the State provide a detailed scoring rubric identifying which specific staff qualifications correspond to each tier (Exceeds, Fully, Addresses, Partially, Fails)? If not, how will evaluators ensure consistent, non-subjective scoring across proposals?

To aid Offerors in understanding the evaluation scoring framework as applied to Section 7.2.1 Evaluation Criteria 1: Staff Qualifications, the following definitions are provided: EXCEEDS (100% of maximum points) The Offeror Response exceeds the specified requirements as outlined within the evaluation criteria and provides the Evaluation Committee with a very high degree of confidence in the OFFEROR’S response or proposed approach. Each individual staff of Offeror’s proposed team meets all of the requirements stated in Section 5.2, including those specifically applicable for the designated project manager. One or more staff also possess qualifications that exceed stated requirements, which may include but are not limited to describing or citing multiple relevant past projects for a requirement, or listing of multiple certifications or degrees.; FULLY (80% of maximum points) The Offeror Response fully addresses the requirements as outlined within the evaluation criteria and provides the Evaluation Committee with a high degree of confidence in the OFFEROR’S response or proposed approach. Each individual staff of Offeror’s proposed team meets all of the requirements stated in Section 5.2, including those specifically applicable for the designated project manager. Satisfactory experience is demonstrated by describing or citing at least one relevant past project for each requirement, or listing of certification or degree completed.; ADDRESSES (60% of maximum points) The Offeror Response addresses the requirements as outlined within the evaluation criteria but are limited in one or more areas. The Evaluation Committee has an acceptable degree of confidence in the OFFEROR’S response or proposed approach. Each individual staff of Offeror’s proposed team meets most of the requirements stated in

Section 5.2, including those specifically applicable for the designated project manager. Satisfactory experience is demonstrated by describing or citing at least one relevant past project for each requirement, or listing of certification or degree completed.; PARTIALLY (40% of maximum points) The Offeror Response partially addresses the requirements as outlined within the evaluation criteria or is very limited. The Evaluation Committee has a low degree of confidence in the OFFEROR'S response or proposed approach. Each individual staff of Offeror's proposed team meets some of the requirements stated in Section 5.2, including those specifically applicable for the designated project manager. Satisfactory experience is demonstrated by describing or citing at least one relevant past project for each requirement, or listing of certification or degree completed.; FAILS (0% of maximum points) The Offeror Response fails to address the requirements as outlined within the evaluation criteria. The Evaluation Committee has no basis for establishing any degree of confidence in the OFFEROR'S understanding of the requirements or capability to perform. Each individual staff of Offeror's proposed team meets only a few of the requirements stated in Section 5.2, including those specifically applicable for the designated project manager. Satisfactory experience is demonstrated by describing or citing at least one relevant past project for each requirement, or listing of certification or degree completed.

14. 2. Section 4.3 identifies certain requirements as non-negotiable minimums that render a proposal non-responsive if unmet. Section 5.2 includes additional staff qualification requirements. Can the State clarify which Section 5.2 requirements are pass/fail minimums versus those evaluated on a sliding scale for points? For example, does failing to provide a PMP-certified Project Manager result in disqualification or merely a lower score?

Offeror responses to Section 5.2 will be evaluated and awarded points following the evaluation criteria and scoring framework stated in Section 7. Also see answer to Question 13 above for additional clarification. There is no specific staff qualification requirement of Section 5.2 that would result in an Offeror disqualification from the evaluation if not sufficiently satisfied in the Offeror's response.

15. 3. Section 5.2 requires staff to have experience with "Workday enterprise financial management systems modernization projects or IT projects of an equivalent or larger size." Will the State clarify how evaluators will weigh Workday-specific experience versus equivalent-scale ERP/EFS project experience when assigning a scoring tier?

Are these treated equally, or does Workday-specific experience qualify for a higher tier?

Correction: The State is seeking Offeror staff with experience in Workday enterprise financial management systems modernization projects of enterprise scale, spanning multiple departments and entities, with total implementation costs minimum range of \$10M or more. Offeror responses to Section 5.2 will be evaluated and awarded points following the evaluation criteria and scoring framework stated in Section 7. Also see answer to Question 13 above for additional clarification. Offeror responses that do not reference Workday specific experience will not fully satisfy this requirement.

16. 4. The Supplemental General Conditions require a fidelity bond or commercial crime policy with limits of \$5,000,000 per occurrence and in the aggregate. This requirement is more appropriate for a System Implementer (SI) who has direct access to State financial systems, handles transactions, and develops or configures software. An IV&V vendor, by the nature of its engagement, serves purely in an independent oversight and advisory capacity — reviewing, assessing, and reporting — with no access to or control over State financial assets, systems configuration, or transactional data. It appears that this requirement was carried over from the EFS SI procurement. Please confirm if this requirement will be waived for the IV&V contract? If the State intends to retain this requirement, can it explain the specific risk scenario an IV&V vendor poses that necessitates \$5,000,000 in fidelity coverage, given that Errors & Omissions (E&O) and General Liability insurance would cover losses arising from the IV&V vendor's advisory work? As an experienced IV&V vendor, we have never been asked to provide this fidelity bond or commercial crime policies (in the State of HI, or any other US state).

The fidelity bond or commercial crime policy requirement will not be waived, as it serves the best interest of the State to remain as a requirement of the contract. It is anticipated that the awarded IV&V offeror will have read-only access or view-only access to the underlying project's various applications and data – which may include development, testing, production and backup environments.

17. 5. The Supplemental General Conditions require Cyber Liability Insurance with limits of \$1,000,000 per claim and \$2,000,000 aggregate, covering a broad range of technology-related risks including intellectual property infringement, information theft, destruction of electronic information, and network security breaches. This

coverage is typically required of SI vendors who develop, configure, and deploy software, handle sensitive personally identifiable information (PII) at scale, or build and operate networked systems — activities that are entirely outside the scope of IV&V services. An IV&V vendor does not write code, configure systems, store State data beyond project documentation, or introduce any technical components into the State's environment. Cyber Liability Insurance of this scope carries a market cost of approximately \$10,000 or more annually, which would be passed directly through to the State in the form of higher proposed pricing, artificially inflating the cost of this procurement without a commensurate reduction in risk. The existing requirements for Errors & Omissions (E&O) and Commercial General Liability insurance already provide the State with coverage for losses arising from the IV&V vendor's professional advisory activities. Please confirm if the state will remove this requirement for the IV&V engagement. As an experienced IV&V vendor, we have never been asked to provide this Cyber Liability insurance (in the State of HI, or any other US state).

The cyber liability insurance policy requirement will not be waived, as it serves the best interest of the State to remain as a requirement of the contract. Using various IT assets, telecommunications, and infrastructure, it is anticipated that the awarded IV&V offeror will have read-only access or view-only access to the underlying project's various applications and data – which may include development, testing, production and backup environments.

18. 6. Section 6.2.8 requires a firm fixed price for the initial 12-month period plus four optional renewal periods. The payment schedule is to be based on the IV&V Project Management Plan, which itself is a deliverable due within 10 business days of Notice to Proceed by the selected IV&V vendor. This is essentially putting the cart before the horse. Can the State confirm whether offerors should propose a payment breakdown, or whether the Price Proposal Form (Attachment 2) requires line-item pricing by deliverable? This is critical since the deliverable schedule will not be fully defined until the IV&V Project Management Plan is accepted by the State.

The State is requesting all Offerors submit, as an attachment, a proposed breakdown of the contract cost by deliverables for the base year, based on requirements in Section 4.6 Project Deliverables, Artifacts. These proposed amounts should align with the Price Proposal Form (Attachment 2). Note that payments for Weekly Status Reports should be rolled into the deliverable payments for the Monthly Status Reports and Executive Sponsor Briefings.

19. 7. The RFP states that the IV&V Project Management Plan is due Within 10 business days after contract Notice to Proceed date and ongoing. Please confirm if the State will consider moving this from 10 to 30 business days, since the first 10 business days will likely be consumed with on-boarding activities.

The State is considering extending the period to initially deliver the IV&V Project Management Plan. Any changes to this due date and time will be made via an Amendment published on HIEPRO – so offerors are encouraged to monitor.

20. 8. Section 4.6 states that "express acceptance and approval by the State is required for deliverables to be marked final," and Section 2.2 confirms the contract is deliverable-based. Can the State confirm that invoicing may only occur after a deliverable has received express written acceptance from the State? If so, can the State define the maximum number of business days it will take to review and either accept or provide written feedback on each submitted deliverable? Without a defined State review and acceptance turnaround time, the IV&V vendor has no contractual protection against indefinite delays in payment that are entirely outside its control.

The State confirms that invoicing may only occur after a deliverable has received express written acceptance from the state. The acceptance criteria, including number of business days for review and feedback, shall be defined in the IV&V Project Plan and mutually agreed upon by the Offeror and state.

21. 9. The deliverables table in Section 4.6 identifies Monthly Status Reports as due on the 5th of every month. Please confirm that this is meant to read, “5th business day of every month”.

The requirement reads as stated in the RFP. However, the State is open to reconsider this due date in the mutually agreed upon IV&V Project Plan.

22. 10. The deliverables table in Section 4.6 identifies Monthly Status Reports as due on the 5th of every month. Section 6.2.8 states that deliverable-based payments will be based on the agreed-upon IV&V Project Management Plan. Can the State confirm whether each accepted Monthly Status Report constitutes a standalone billable deliverable with an associated payment milestone? Or does payment consolidate multiple deliverables — for example, combining weekly status reports, monthly reports, and other artifacts — into a single monthly invoice? Clarity on this point is

essential for offerors to structure a realistic payment schedule in their IV&V Project Management Plan.

The State confirms each accepted Monthly Status Report constitutes a standalone billable deliverable (other standalone deliverables include the IV&V Project Management Plan, Initial Assessment Report, Pre- and Post Go-Live Reports, and Final Report). Additionally, the weekly status reports can be combined with the single monthly invoice.

23. 11. Section 4.6 requires the State to review draft deliverables before they are marked final, and implies that payment is tied to final accepted deliverables. However, the RFP does not specify a maximum State review period for draft submissions, nor does it address what happens if the State requests multiple rounds of revisions. Can the State clarify the following: a. What is the maximum number of business days the State will take to review a draft deliverable and provide written acceptance or revision comments? b. Is there a cap on the number of revision cycles the State may request before a deliverable is deemed accepted? c. If the State does not respond within the defined review period, will the deliverable be deemed accepted for invoicing purposes? Without these protections, offerors bear unlimited revision risk on a fixed-price contract, with payment entirely contingent on State responsiveness.

a. The number of business days for review of deliverables shall be defined in the IV&V Project Plan and mutually agreed upon by the Offeror and State. b. Conditions for acceptance shall be defined in the IV&V Project Plan and mutually agreed upon by the Offeror and State. c. Conditions for acceptance shall be defined in the IV&V Project Plan and mutually agreed upon by the Offeror and State. The State's expectation is that fair and reasonable conditions for deliverable acceptance will be defined in the IV&V Project Plan and mutually agreed upon by Offeror and State.

24. 12. Section 6.2.8 states that deliverable-based payments will be based on the agreed-upon IV&V Project Management Plan, which per Section 4.6 is due within 10 days of Notice to Proceed. This means the specific payment milestones and amounts are not defined until after contract award and execution. Can the State clarify the following: a. Will the Price Proposal Form (Attachment 2) require offerors to propose a preliminary payment schedule at the time of proposal submission, or only a total contract price? b. If a preliminary payment schedule is required, will it be binding or subject to renegotiation during IV&V Project Management Plan development? c. What

happens if the State and the awarded vendor cannot reach agreement on the payment schedule during IV&V Project Management Plan negotiations — is there a dispute resolution process, or does the State retain sole discretion over the final payment structure – which is to be defined by the IV&V vendor? This ambiguity represents a significant financial risk for offerors who must price a fixed contract without knowing the timing or structure of payment milestones.

a. Yes - The State is requesting all Offerors submit, as an attachment, a proposed breakdown of the contract cost by deliverables for the base year, based on requirements in Section 4.6 Project Deliverables, Artifacts. These proposed amounts should align with the Price Proposal Form (Attachment 2). Note that payments for Weekly Status Reports should be rolled into the deliverable payments for the Monthly Status Reports and Executive Sponsor Briefings. b. The proposed price breakdown submitted by Offerors is preliminary, subject to changes during the IV&V Project Plan development, to be mutually agreed upon by the State and Offeror. The amounts listed on the Price Proposal Form (Attachment 2), however, are intended to be final as submitted – and any change to these amounts must be made by contract modification. c. The IV&V Project Plan must be mutually agreed upon by the State and Offeror. The contract administrator is the primary State representative and responsible for working with the Offeror to achieve mutual agreement, as well as reviewing, and accepting all deliverables under this contract. Within the Department of Accounting and General Services, the escalation path for issues that cannot be resolved initially by the contract administrator would be: 1) Procurement Officer, 2) the Chief Information Officer, and 3) the Comptroller. This does not preclude either party from seeking remedies available by the State’s general conditions of this contract, Hawaii Revised Statutes, and Hawaii Administrative Rules.

25. 13. Section 4.6 requires the IV&V Project Management Plan within 10 days of Notice to Proceed. However, developing a meaningful plan — one that addresses the 24 critical components in Section 4.3, proposed payment milestones, staffing, methodology, and acceptance criteria — requires access to foundational project documentation including the project charter, implementation schedule, EFS vendor contracts, risk registers, and organizational charts. Additionally, per IEEE 1012, the selected IV&V vendor will need to work directly with the State to determine the integrity levels for required scope, intensity, and rigor of the IV&V Management Plan. Last, in our experience, State agencies typically require two or more weeks after Notice to Proceed simply to locate and transmit this documentation, making a 10 day turnaround effectively impossible without it. Can the State address the following: a)

What project documentation will be made available to the awarded IV&V vendor at or before Notice to Proceed, and in what format? b) Will the 10 day clock begin only after the State has provided all foundational project documentation to the awarded vendor, rather than from the Notice to Proceed date itself? c) What is the State's estimated review and acceptance turnaround time for the IV&V Project Management Plan, and does the 10 day deadline account for potential State revision requests and resubmission cycles given that Section 6.2.8 ties the payment schedule to the accepted plan?

a. After the Notice to Proceed has been issued, all non-confidential project artifacts in support of the EFS project will be made available to the Offeror – this may include (but is not limited to) the EFS solicitation’s proposal documents submitted by the implementation vendor team, and any deliverables or artifacts that have been submitted by the implementation vendor team to the State as part of the EFS project. This also includes access to any system environments, applications, and data necessary to perform the responsibilities listed in this RFP. b. The 10-day clock will begin after the Notice to Proceed has been issued. c. The Offeror must initially submit the IV&V Project Management Plan to the State within the 10-day window. Mutual agreement and final acceptance can occur past the 10-day period. The State intends to expedite working toward mutual agreement, review, and acceptance of the IV&V Management Plan, as this is the foundation of the project’s activities, tasks, and expectations. Note: The State is considering extending the 10-day period deadline for initial delivery of the IV&V Project Management Plan. Any changes to this due date and time will be made via an Amendment published on HIEPRO – so offerors are encouraged to monitor.

26. 14. Attachment 2 — Price Proposal Form states that "a breakdown of the contract cost by deliverables should be provided as an attachment." Simultaneously, Section 6.2.8 states that deliverable-based payments will be based on the agreed-upon IV&V Project Management Plan, which is a post-award deliverable. Exhibit A — Contract Sample references a separate Compensation and Payment Schedule (Contract Attachment 2) which appears as a blank form to be completed at contract execution. Can the State clarify the relationship and hierarchy among these three payment documents: a. The deliverable cost breakdown attached to the Price Proposal Form at proposal submission b. The Compensation and Payment Schedule (Contract Attachment 2) executed at contract signing c. The payment schedule proposed within the IV&V Project Management Plan post-award Specifically: is the deliverable breakdown submitted at proposal time binding, informational only, or subject to

renegotiation at contract execution? Will the Compensation and Payment Schedule in the executed contract supersede the proposal deliverable breakdown? And does the IV&V Project Management Plan payment schedule operate as a sub-schedule within the framework established by Contract Attachment 2, or does it replace it entirely?

See answer to Question 24. Additionally, the Compensation and Payment Schedule (Contract Attachment 2) will reflect the amounts on the Offeror's submitted Price Proposal Form. The IV&V Project Management Plan's payment schedule will operate as a sub-schedule within the framework established by Contract Attachment 2.

27. 15. The RFP currently states that "Solution Alternatives Evaluation. Verify that the recommended solution can satisfy business and user needs and the mid-level requirements associated with the solution, and supports Project objectives. Verify that viable alternatives were identified and documented within the PAL documentation." Please provide some additional information on this component of the 4.3 Critical Components of the Scope of Work. There appears to be a misalignment between what is required, and what is referenceable to State of Hawaii IT Projects.

Clarification: At various points in the EFS project, decisions must be made affecting system aspects such design, configuration, data – among others. The successful Offeror must verify that viable alternatives were identified, considered, and documented by the EFS project team. This is the intent of the 19. Solution Alternatives Evaluation requirement, and Offerors shall disregard the "within the PAL documentation" phrase of the requirement.

28. 16. Please provide a listing of specifically which SI deliverables are expected to be reviewed by the IV&V vendor.

At this point, it is not feasible to provide a definitive list of system integrator deliverables expected to be reviewed by the IV&V vendor. All non-confidential project artifacts in support of the EFS project will be made available to the Offeror – this may include (but is not limited to) the EFS solicitation's proposal documents submitted by the implementation vendor team, and any deliverables or artifacts that have been submitted by the implementation vendor team to the State as part of the EFS project. This also includes access to any system environments, applications, and data necessary to perform the responsibilities listed in this RFP.

29. Page 34 - Section 6.2.8 Price Can the State confirm that the maximum allowable budget for the entire 5-year engagement (base year plus four option years) is capped at \$5,000,000 (i.e., \$1,000,000 per year)?

Yes - the State is seeking proposals from Offerors that have a total, not-to-exceed price of \$1M per year, for a period of 5 years (base year period, with up to four (4) option year periods).

30. 17. Section 5.3 acknowledges that accommodations will be made for remote participation and collaboration via Microsoft Teams, and that any proposed remote work must be identified in the offeror's proposal and pre-approved by the State. IV&V services are by their nature primarily analytical, documentation-based, and review-oriented activities — the substantial majority of which, including deliverable reviews, report preparation, risk and issue analysis, requirements traceability assessments, and schedule and cost monitoring, can be performed effectively and efficiently without requiring physical presence at State facilities. On-site presence is most valuable for specific activities, which in our experience represent a small fraction of total IV&V effort on engagements of this type. Can the State address the following: a. Will the State confirm that the majority of IV&V work under this contract may be performed remotely, with on-site presence required only for specific activities. Please confirm the cadence of these activities for planning and travel cost insights. b. What percentage of the EFS project team's own DAGS and ETS personnel are currently working on-site versus remotely, and will the IV&V vendor's remote work arrangements be evaluated against the same standard applied to State project staff? c. Will remote work pre-approval be addressed during IV&V Project Management Plan negotiations after award, or must offerors propose a specific on-site versus remote split in their proposal for evaluation purposes, given the direct cost implications for staff not based in Hawaii?

Clarification: a. The majority of work done by the EFS implementation vendor team is expected to be on-site. Thus, the Offeror should also assume the same for the services required under this RFP. Exact cadence is not known at this time, so Offeror should use past experience and professional judgment to estimate the amount of time spent on-site versus off-site to perform the work. b. The DAGS staff responsible for leading the EFS implementation project is currently 100% on-site. Other DAGS and state staff supporting the EFS implementation project may adhere to hybrid work policies. While 100% on-site work is not a requirement, Offerors should account for a majority of work to be on-site in their proposals. c. Offerors must propose an estimated percentage of on-site vs. off-site

work to provide insight and context to the technical approach, as well as to account for in the Offeror pricing. The IV&V Project Management Plan may include additional procedures, guidelines and expectations regarding on-site vs. off-site work, subject to mutual agreement by both the State and Offeror.

31. Page 33 Section 6.2.4 Executive Summary The RFP specifies a strict 1-page limit for the Executive Summary. Are there any maximum page limits imposed on the remaining narrative sections, specifically the Technical Approach (Section 6.2.7), Staff Qualifications (Section 6.2.5), or OFFEROR’S Experience (Section 6.2.6)?

No.

32. Page 15 Section 2.17 Conflict of Interest Exclusion Section 2.17 strictly prohibits the selected IV&V vendor from participating in the EFS implementation to avoid conflicts of interest. To ensure a level playing field, will the State also disqualify any OFFEROR (or its subcontractors) who previously provided consulting, planning, requirements gathering, or procurement support services prior to this specific EFS project implementation phase, ensuring they are not placed in a position of independently verifying their own prior work?

Any Offeror (or its subcontractors) who will potentially be providing the IV&V services on any work product or service included in the EFS implementation project’s scope will be disqualified to avoid the appearance of a conflict of interest.

33. Page 32 Section 6.1.5 Font Does the 12-point Aptos font requirement apply strictly to the main body narrative, or does it also apply to text contained within graphics, organizational charts, tables, and the attached resumes of proposed key personnel?

The 12-point Aptos font applies to the main body of the proposals, although Offerors are encouraged to use consistent font throughout the entirety of the proposal document(s).

34. 18. Section 4.3 identifies 24 critical components for IV&V oversight but does not explicitly reference data conversion oversight as a standalone critical component, despite the fact that the EFS implementation requires migration from a 55-year-old COBOL-based FAMIS system on an IBM mainframe to a modern Workday SaaS platform — a data conversion effort of significant complexity and risk involving

decades of accumulated State financial data across multiple business functions including budget execution, general ledger, procure-to-pay, fixed assets, grants, and project accounting. In our experience, data conversion is consistently one of the highest-risk activities on government ERP implementations of this scale, and inadequate IV&V oversight of conversion planning, mock conversion execution, data validation, and reconciliation activities is a leading contributor to post-go-live data integrity issues that can disrupt State financial operations. Can the State confirm whether data conversion oversight is expected to be included within the scope of IV&V services under this contract, and if so, under which of the 24 critical components it should be addressed? Additionally, will the IV&V vendor be provided access to data conversion plans, extract-transform-load specifications, mock conversion results, and data reconciliation reports necessary to perform meaningful independent oversight of this activity, and will the EFS implementation vendor be contractually required to cooperate with the IV&V vendor's data conversion assessment activities?

IV&V of data conversion activities is in-scope of this RFP, specifically included under 8. Development Management in Section 4.3, as well as under the “Reviewing and analyzing ongoing project management and implementation tasks and activities, operational policies, and processes to ensure quality objectives are met and industry best practices are followed” requirement of Section 4.5. The IV&V vendor will be provided with all artifacts and system environments in support of meeting this requirement, and the EFS implementation vendor is contractually required to cooperate with the IV&V vendor’s data conversions assessment activities.

35. Page 34 Section 6.2.8 Price Given that many IV&V tasks are continuous and recurring (e.g., Weekly Status Reports, Monthly Status Reports), does the State prefer that these continuous services be billed as equal monthly installments tied to the delivery of the Monthly Status Report, or are payments expected to be tied solely to the completion of major system implementation milestones?

The State expects the majority of invoices to be tied to a monthly frequency, although the Offeror is free to propose alternative payment schedules. The weekly status reports should be included in the monthly invoice cycle.

36. Page 47 Attachment 5, Section I. Accessibility Will the State provide pre-approved, accessible document templates for the Monthly Status Reports and Executive Dashboards, or is the selected IV&V vendor entirely responsible for developing the

templates and independently verifying they meet the State's disability access standards?

The selected IV&V vendor is responsible for providing all report deliverables that are in compliance with the State's accessibility standards.

37. Page 15 Section 2.17 Conflict of Interest Exclusion Does the conflict of interest exclusion apply to a vendor or subcontractor who previously submitted a proposal for the EFS implementation project, but was not awarded the implementation contract?

Any Offeror (or its subcontractors) who will potentially be providing the IV&V services on any work product or service included in the EFS implementation project's scope will be disqualified to avoid the appearance of a conflict of interest. If this situation applies to a vendor or subcontractor who previously submitted a proposal for the EFS implementation project, but was not awarded the implementation contract, then the conflict of interest exclusion applies.

38. Page 15 Section 2.17 Conflict of Interest Exclusion The State recently released a solicitation for additional readiness work. Please confirm that the vendor that will be awarded that work will be excluded from this IV&V opportunity due to the same conflict of interest.

Any Offeror (or its subcontractors) who will potentially be providing the IV&V services on any work product or service included in the EFS implementation project's scope will be disqualified to avoid the appearance of a conflict of interest.

39. 1. Can the State confirm the selected EFS implementation vendor(s) and their current project status (e.g., contract awarded, project started, planning phase)?

An intent to award for the EFS implementation project was made to Guidehouse. The project is currently in the contract formulation phase.

40. 2. Will IV&V services be expected to begin prior to the EFS implementation kickoff (planned for Q1 FY2027), and should Offeror include pre-implementation readiness or contract negotiation support?

The State's intent is for the IV&V vendor to start work prior to the EFS implementation kickoff. The focus however, remains on the implementation project itself, not contract negotiation or readiness support.

41. 3. Who are the primary recipients and reviewers of weekly and monthly IV&V reports and executive briefings?

Weekly reports are for the State's project management team, including the EFS system implementation vendor project management team. The monthly reports are for the audience above, including project leadership. The monthly reports, as well as any pre- or post- go-live reports and the final report, will also be sent to the Legislature and posted on the ETS website for the public. Executive briefings are for State's executive leadership, and may include representatives from the system implementation vendor.

42. 4. The RFP includes benefits realization and asks the IV&V contractor to assess whether expected benefits and outcomes are being delivered and recommend metrics. Has the State already defined EFS business case benefits, KPIs, baselines, and target outcomes?

Definitive EFS business case benefits, KPIs, baselines and target outcomes will be identified as part other EFS implementation project.

43. 5. Would the State consider a COLA (Cost of Living Adjustment) tied to a Consumer Price Index (CPI) that would be applied annually to the \$1,000,000 ceiling for payment of IV&V services?

No cost of living adjustment allowance is applied to the budget available for this project.

End