



RELEASE DATE: May 11, 2020

**The State of Hawaii**  
**Department of Accounting and General Services**

**Request for Proposals**  
**Solicitation #RFP-HIP-2020-01**

**HIP Service Center Support**

OFFERS ARE DUE AT 2:00 P.M., HAWAII STANDARD TIME (HST) ON  
May 25, 2020

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

BY SUBMISSION TO THE DEPARTMENT OF ACCOUNTING AND GENERAL SERVICES

**DIRECT ALL QUESTIONS REGARDING THIS RFP, QUESTIONS OR ISSUES RELATING TO  
THE ACCESSIBILITY OF THIS RFP (INCLUDING THE ATTACHMENTS AND EXHIBITS AND  
ANY OTHER DOCUMENT RELATED TO THIS RFP) AND REQUESTS FOR  
ACCOMMODATIONS FOR PERSONS WITH DISABILITIES IN CONNECTION WITH THIS RFP,  
TO:**

LENORA FISHER, TELEPHONE  
(808) 586-0600 OR EMAIL ADDRESS [lenora.d.fisher@hawaii.gov](mailto:lenora.d.fisher@hawaii.gov).

Lenora Fisher  
Procurement Officer

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## RFP Administrative Information

RFP Title:	HIP Service Center Support
RFP Project Description: (See Section Purpose)	Hawaii Information Portal (HIP) Service Support Center.
RFP Lead: (See Section 1.6 Point of Contact, State Contract Administrator)	Buyer Name – Lenora Fisher Agency Name – Department of Accounting and General Services Agency Address – 1151 Punchbowl St., Rm 320 Honolulu, HI 96813 Buyer email – lenora.d.fisher@hawaii.gov Buyer Phone – (808) 586-0600
Submit proposals electronically via Hawaii Electronic Procurement System (HiePRO): (See Section 4.3 Electronic Submission of Proposals)	Electronic Submission hiepro.ehawaii.gov
Pre-Proposal Conference:	May 14, 2020; 11:00 AM Hawaii Standard Time (HST)
Pre-Proposal Conference Location: (See Section 2.5 Pre-Proposal Conference)	Internet Broadcast, see details in Section 2.5 Pre-Proposal Conference
Deadline To Receive Questions: (See Sections Schedule and Significant Dates and 2.7 Electronic Submission of Questions)	May 18, 2020; 2:00 PM Hawaii Standard Time (HST)
Question & Answers: (Sections Schedule and Significant Dates and 2.7 Electronic Submission of Questions)	All questions must be submitted through HiePRO
RFP Closing Date: (See Section Schedule and Significant Dates)	May 25, 2020
RFP Closing Time: (See Section Schedule and Significant Dates)	2:00 PM Hawaii Standard Time (HST)
Initial Term of Contract and Renewals: (See Section 1.5 Period of Performance)	July 15, 2020 to July 31, 2021. See details in Section 1.5 Period of Performance
<p><b>TAKE NOTE THE MANDATORY .75% (.0075) TRANSACTION FEE TO HAWAII INFORMATION CONSORTIUM, LLC (HIC) BASED ON THE AWARD MADE IN HIEPRO. (DETAILED IN SECTION 4.3 ELECTRONIC PROCUREMENT AND SECTION 3.5 Payment to Hawaii Information Consortium, LLC (HIC)3.5 Payment to Hawaii Information Consortium, LLC (HIC)</b></p>	



## Offer Checklist

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

No.	Description	Reference in RFP	Completed
1	Offer Checklist – submittal of checklist with all items checked “completed.”	Offer Checklist	<input type="checkbox"/>
2	Offer Forms OF-1 Completed and signed  NOTE: Ensure that company name submitted in HlePRO matches company name on OF-1.		<input type="checkbox"/>
3	Table of Contents	Section 4.4 Required Format and Content	<input type="checkbox"/>
4	Executive Summary, not to exceed two (2) page(s)	Section 4.4 Required Format and Content	<input type="checkbox"/>
5	Management Approach, not to exceed three (3) pages	Section 6.1 Management Approach Submittal	<input type="checkbox"/>
6	Technical, not to exceed three (3) page(s)	Section 6.2 Technical Approach Submittal	<input type="checkbox"/>
7	Past Performance	Section 6.3 Past Performance Submittal ATTACHMENT C Offer Form (OF-2)	<input type="checkbox"/>
8	Price	Section 6.4 Price Evaluation; ATTACHMENT D Offer Form (OF-3)	<input type="checkbox"/>
9	Confidential, Protected or Proprietary Information Section	Section 4.4 Required Format and Content	<input type="checkbox"/>

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Authorized Offeror Signature

# REQUEST FOR PROPOSALS HIP Service Center Support

Solicitation # RFP-HIP-2020-01

## Section 1: General Information

### 1.1 Purpose

Temporary customer service representatives are needed to assist the Department of Accounting and General Services (DAGS) to perform activities related to the Payroll and Time and Leave Hawaii Information Portal (HIP) software. Customer service representatives are anticipated to provide phone and email support of the HIP Service Center located at 1151 Punchbowl St., Honolulu, HI 96813.

### 1.2 Background

The HIP Service Center serves as a call center for employees across all State of Hawaii government jurisdictions, departments, and agencies. Service center agents will typically assist employees with HIP system access issues, respond to questions about how to submit online, self-service transactions for payroll and time and leave, and will on occasion answer questions about paycheck details within the online pay statements. The service center agents will also dispatch case items to state operational staff for resolution, if necessary. The HIP Service Center provides support to approximately 70,000 State of Hawaii employees on the State's payroll during State office hours, 7:45 am to 4:30 pm, Monday through Friday, excluding State holidays.

### 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, such as "Proposals Due Date and Time" is delayed, the rest of the schedule may likely 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.

Event	Date
Solicitation Release:	May 11, 2020
Pre-Proposal Conference:	May 14, 2020 at 11:00 am Hawaii Standard Time, via internet broadcast
Question Submittal Deadline:	May 18, 2020 at 2:00 pm Hawaii Standard Time
Answers to Questions:	May 20, 2020
Proposal Due Date and Time:	May 25, 2020 at 2:00 pm Hawaii

	Standard Time
Evaluations	June 1, 2020 at 4:00 pm Hawaii Standard Time
Estimated Date for Discussions, if necessary	June 5, 2020
Estimated Due Date for BAFO, if necessary	June 12, 2020
Evaluation of BAFO, if necessary	June 19, 2020
Anticipated Award Date:	June 26, 2020

#### 1.4 Contract Type

This contract shall be on a firm fixed hourly rate basis, and the Contractor shall be paid for the actual number of hours of work performed by each agent.

#### 1.5 Period of Performance

This contract shall be for a period of 12 months 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 three (3) additional 12-month periods, or parts thereof.

#### 1.6 Point of Contact

The Department of Accounting and General Services (DAGS) is the issuing office for this document and all subsequent addenda relating to it. The reference number for the transaction is Solicitation #**RFP-HIP-2020-01**. This number must be referred to on all proposals, correspondence, and documentation relating to the RFP.

The Contract Administrator identified below is the single point of contact (POC) **during** this procurement process. Offerors and interested persons shall direct to the Contract Administrator all questions concerning the procurement process, technical requirements of this RFP, contractual requirements, changes, clarifications, and protests, the award process, and any other questions that may arise related to this solicitation and the resulting contract. The Contract Administrator designated by the State of Hawaii is:

Lenora Fisher  
Accounting Administrator  
Accounting Division  
1151 Punchbowl St. Suite 320, Honolulu, HI 96813  
lenora.d.fisher@hawaii.gov  
Phone: (808) 586-0600

## 1.7 Definitions

The following definitions apply to this solicitation .

**Contract Administrator** means the person designated to manage the various facets of the contract(s) to ensure the Contractor's total performance is in accordance with the contractual commitments and obligations are fulfilled.

**Contractor** means the person having a contract with a governmental body.

**Department of Accounting and General Services (DAGS)** is the issuing agency.

**Fixed-price basis** means an established price agreed upon by the Contractor and Purchasing Entity, by agreement or by authority, as the price to be charged for a specified amount of services.

**Goods** mean all property, including but not limited to equipment, equipment leases, materials, supplies, printing, insurance, and processes, including computer systems and software, excluding land or a permanent interest in land, leases of real property, and office rentals.

**Governmental body** means any department, commission, council, board, bureau, authority, committee, institution, legislative body, agency, Government Corporation, or other establishment or office of the executive, legislative, or judicial branch, city or county of any U.S. State, (including the Office of Hawaiian Affairs for the State of Hawaii).

**Hawaii Administrative Rules (HAR)** means the adopted operating procedures for state agencies authorized by the laws of the State of Hawaii.

**Hawaii Information Portal (HIP)** means the Oracle Peoplesoft software that the State of Hawaii uses for its Human Resources, Payroll, and Time and Leave application.

**Hawaii Revised Statutes (HRS)** means the laws that govern the State of Hawaii.

**Key Performance Indicator (KPI)** means how a quantifiable measure is utilized to assess the success of a Contractor in meeting strategic goals and objectives for performance.

**Offeror** means the company or firm who submits a proposal in response to this Request for Proposal.

**Proposal** means the official written response submitted by an Offeror in response to this Request for Proposals.

**Proposer** has the same meaning as Offeror.

**Request for Proposals or "RFP"** means the entire solicitation document, including all

parts, sections, exhibits, attachments, and Addenda.

**Services** means the furnishing of labor, time, or effort by a contractor or vendor, which involves the delivery or supply of products.

**Statement of Work** defines the services to be delivered by the Contractor.

## **Section 2: Solicitation Information**

### **2.1 Governing Laws and Regulations**

This procurement is conducted by the Department of Accounting and General Services (DAGS), Pre-Audit Division, in accordance with the State Procurement Code. Information about 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 Overview of the State of Hawaii Procurement Process**

- 2.2.1** The RFP is issued pursuant to Subchapter 6 of HAR chapter 3-122, implementing HRS §103D-303 on competitive sealed proposals.
- 2.2.2** The RFP will be issued through the Hawaii State eProcurement System (HlePRO). Written questions regarding the RFP are submitted through HlePRO. Responses to questions are issued by Addendum through HlePRO. Changes to the RFP are issued by Addendum through HlePRO.
- 2.2.3** Proposals shall be received through HlePRO. Offeror's proposal shall be open to the public after posting of award, except for portions of the proposal that the Offeror has labeled confidential and/or proprietary pursuant to HAR §3-122-58.
- 2.2.4** An evaluation committee approved by the Procurement Officer, shall evaluate the proposals in accordance with Section 5.8 Evaluation Criteria.
- 2.2.5** Proposals may be accepted on evaluation without discussion. If deemed necessary, prior to entering discussions, a "priority list" of responsible Offerors submitting acceptable and potentially acceptable proposals shall be generated. The priority list may be limited to a minimum of three (3) responsible Offerors who submitted the highest-ranked proposals. The objective of these discussions is to clarify issues regarding the Offeror's

proposal before the Best and Final Offer (BAFO) is tendered.

- 2.2.6** If the State determines a BAFO is necessary, it shall request one from the Priority-Listed Offeror(s). The Offeror shall submit its BAFO through HlePRO.
- 2.2.7** If during discussions there is a need for any substantial clarification or change in the RFP, the RFP shall be amended by an addendum to incorporate such clarification or change. Addenda to the RFP shall be distributed only to priority-listed offerors.
- 2.2.8** The date and time for Offerors to submit their BAFO, if any, is indicated in Section Schedule and Significant Dates. If Offeror does not submit a notice of withdrawal or a BAFO, the Offeror's immediate previous bid shall be construed as its BAFO.
- 2.2.9** After receipt and evaluation of the BAFOs in accordance with Section 5.8 Evaluation Criteria, the evaluation committee may have additional discussions after receiving approval by the Chief Procurement Officer (CPO) to conduct a second BAFO. Award(s), if any shall be made to the Offeror(s) whose proposal is determined to be the most advantageous to the State taking into consideration price and the evaluation factors set forth in the RFP.
- 2.2.10** The contents of any proposal shall not be disclosed during the review, evaluation, discussion process, or to any individuals who have not signed a non-disclosure agreement. Once the notice of award(s) is made, all proposals, successful and unsuccessful, become available for public inspection. Those sections that the Offeror and the State agree are confidential and/or proprietary should be identified by the Offerors and shall be excluded from public access.

If a person is denied access to a State procurement record, the person may appeal the denial to the office of information practices in accordance with HRS §92F-42(12).

- 2.2.11** The RFP, any addenda issued, and the successful Offerors' proposal shall become a part of the contract. All proposals shall become the property of the State of Hawaii.

## **2.3 Electronic Procurement**

- 2.3.1** 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.

**2.3.2** The State will use HlePRO to issue the RFP, receive Offers, and issue Addenda to the RFP. Addenda and the other information and materials shall be provided by the State through HlePRO, including additions or changes with respect to the dates in Section Schedule and Significant Dates. The State shall not be responsible for any person's or entity's failure to do so for any reason. The State is not responsible for any delay or failure of any Offeror to receive any materials updated through the RFP Process on a timely basis.

**2.3.3** As part of this procurement process, Offerors are informed that awards made for this solicitation, if any, shall be done through the HlePRO and shall, therefore, be subject to a mandatory .75% (.0075) transaction fee, not to exceed \$5,000 for the total contract term. The mandatory fee (.75%) is applicable for awards to Hawaii government agencies only, calculated on a quarterly basis for the first year only. This transaction fee shall be based on the total sales made against this contract, payable to Hawaii Information Consortium, LLC (HIC), the vendor administering HlePRO. Refer to the Section 3.5 Payment to Hawaii Information Consortium, LLC (HIC)

**2.3.4** HlePRO Special Instructions. Offeror 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 are advised that they should not wait until the last minute to submit their proposal on HlePRO. Offerors should allow ample time to review their submitted proposal, including attachments, prior to the proposal deadline.

## **2.4 RFP Addenda**

Changes to this RFP including but not limited to contractual terms and procurement requirements shall only be changed via formal written addenda issued by the Department of Accounting and General Services.

The State accepts no responsibility for a prospective Offeror not receiving solicitation documents and/or revisions to the solicitation. It is the responsibility of the prospective Offeror to monitor HlePRO to obtain RFP addenda or other information relating to the RFP.

## **2.5 Pre-Proposal Conference**

A pre-proposal conference will be held on May 14, 2020 at 11:00am Hawaii Standard Time, via internet broadcast.

[Join Microsoft Teams Meeting](#)

[https://teams.microsoft.com/l/meetup-join/19%3ameeting\\_YTRkYzEwYTMtYjcwMy00OWVjLWEyZDUtMGJiNmJmZjQ5Zjc1%40thread.v2/0?context=%7b%22Tid%22%3a%223847dec6-63b2-43f9-a6d0-58a40aaa1a10%22%2c%22Oid%22%3a%22a6a746ae-fff5-4de7-81a0-ce032bece4b6%22%7d](https://teams.microsoft.com/l/meetup-join/19%3ameeting_YTRkYzEwYTMtYjcwMy00OWVjLWEyZDUtMGJiNmJmZjQ5Zjc1%40thread.v2/0?context=%7b%22Tid%22%3a%223847dec6-63b2-43f9-a6d0-58a40aaa1a10%22%2c%22Oid%22%3a%22a6a746ae-fff5-4de7-81a0-ce032bece4b6%22%7d)

If joining via Audio Only: [+1 808-829-4853](tel:+18088294853) United States, Honolulu (Toll), Conference ID: 173 786 13#

Attendance at the conference is optional. A summary of the pre-proposal conference will be provided via an addendum posted in HlePRO.

## **2.6 Questions Regarding RFP Contents**

If a Prospective Offeror believes that any provision of the RFP is unclear, potentially defective or would prevent from providing a meaningful Offer, the Offeror shall submit questions to the State POC requesting clarification on or before the deadline for doing so in Section Schedule and Significant Dates. Each question shall identify the page, section number, paragraph, and line or sentence of such provision(s) of the RFP to which the question applies. The State POC will respond by the date for the same in Section Schedule and Significant Dates. The State may issue Addenda in response to written questions received regarding the RFP.

## **2.7 Electronic Submission of Questions**

All questions must be submitted through the Hawaii State eProcurement System (HlePRO). Questions must be submitted by the question deadline date and time shown in Section Schedule and Significant Dates. Answers will be given via the HlePRO site as noted in Section Schedule and Significant Dates.

Offerors are cautioned about including context in questions that may reveal the source of questions. The identity of potential Offerors will not be published with the answers, but the text of questions will be restated, to the extent possible, to exclude information identifying potential Offerors.



## **2.8 Proposal Due Date**

Proposals must be received by the posted closing date and time as described in Section Schedule and Significant Dates of this RFP.

## **2.9 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 thru HAR §3-122-97.

## **2.10 Firm Offers**

Responses to this RFP, including proposed costs and/or fees will be considered firm for ninety (90) days after the proposal due date.

## **2.11 Right to Accept All or Portion of Proposal**

Unless otherwise specified in the solicitation, the State may accept any item or combination of items as specified in the solicitation or of any proposal unless the Offeror expressly restricts an item or combination of items in its Proposal and conditions its response on receiving all items for which it provided a proposal. If the Offeror so restricts its Proposal, the State may consider the Offeror's restriction and evaluate whether the award on such basis will result in the best value to the State. The State may otherwise determine at its sole discretion that such restriction is non-responsive and renders the Offeror ineligible for further evaluation.

## **2.12 Ownership or Disposition of Proposals and other 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.

## **2.13 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. As noted, each Offeror shall submit only one Proposal. If an Offeror submits more than one Proposal, then the State reserves the right to reject and or dismiss the Offeror from the RFP Process.

## **Section 3: Requirements**

### **3.1 Mandatory Minimum Administrative Proposal Requirements**

This section contains the minimum requirements that must be met to be considered for the evaluation phase. All items described in this section are non-negotiable. All Offerors must state willingness and demonstrate the ability to satisfy these requirements in the proposal submitted for consideration. Offerors shall be considered non-responsive if unable to cover the minimum requirements and may not be considered for award.

### **3.2 Minimum Requirements and Qualifications**

The Contractor shall provide temporary staffing of PeopleSoft helpdesk support physically located at the State of Hawaii Department of Accounting and General Services' site: Kalanimoku Building, 1151 Punchbowl Street, Honolulu, HI 96813. The "HIP Service Center" provides phone and email support to State of Hawaii employees using the State's Oracle PeopleSoft system known as the Hawaii Information Portal (HIP). Services are provided Monday through Friday, 7:45am to 4:40pm excluding State holidays which are incorporated by reference at: <https://dhrd.hawaii.gov/state-observed-holidays/>. The HIP Service Center answers State of Hawaii employee questions regarding the Peoplesoft software that functions as the State's system of record for human resources, payroll, time, and leave data and manages employees' security access to the system.

The Contractor shall provide and five (5) full-time equivalent "agents" who will handle customer calls and emails, and one (1) full-time equivalent on-site supervisor for the duration of the contract that shall perform all of the tasks of the agents, plus customer escalations via email or phone, act as the main point of contact for the State's Contract Administrator, and provide quality assurance among the agents.

During certain periods of the year, the number of calls and emails may be higher than normal. The Contractor shall provide seven (7) agents during these timeframes:

- October 1 – November 30, 2020
- January 15 – February 7, 2021
- March 1 – 30, 2021
- September 1 – October 30, 2021
- January 15 – February 7, 2022
- January 15 – February 7, 2023

The Contractor must provide the desired number of full-time or equivalent employees to meet the demands of the project, as determined by the Department of Accounting and General Services (DAGS).

The Contractor must provide employees who have PeopleSoft or equivalent HR/Payroll/Time and Leave software experience.

The Contractor shall complete background screening of customer service representative candidates prior to commencing work with DAGS. Background screening shall include, at minimum:

- 1) Education, qualification and background verification – highest degree earned;
- 2) Qualification verification – number of years of data entry or equivalent system update experience;
- 3) Employment verification – last TWO (2) employers;
- 4) Reference check – TWO (2) professional references; and
- 5) Background check – no conviction of a violation of any law.

The Contractor shall incorporate resumes of customer service representative candidates to DAGS for consideration and review with the proposal. The State of Hawaii reserves the right to accept or reject candidates proposed for selection.

### **3.3 Confidentiality of Material**

All personal information given to or made available to the Contractor by the State shall be safeguarded by the Contractor and shall not be disclosed without the prior written approval of the State. Personal information includes an individual's first name or first initial and last name in combination with any one or more of the following data elements, when either name or data elements are not encrypted:

- 1) Social security number;
- 2) Bank account numbers;
- 3) Date of birth;
- 4) Information in the individual's personnel files, including but not limited to: name, compensation, job title, home address, home or personal telephone number, education, training, and background and marital status;
- 5) Information relating to an individual's finances, income, assets, liabilities, net worth, bank or other accounting with financial or investment institutions, bank or other asset or cash balances, financial history or activities or credit worthiness;
- 6) Information relating to the eligibility for social services or welfare benefits or to the determination of benefit levels; and
- 7) Information comprising personal recommendations or evaluations.

The Contractor shall not retain, use, or disclose personal information for any purpose other than as permitted or required by the State. Appropriate "technological safeguards" that are acceptable to the State to reduce the risk of unauthorized access to personnel

information shall be implemented by the Contractor. Any security breaches involving personal information shall be reported to the State in a prompt and complete manner. The Contractor shall mitigate, to the extent practicable, any harmful effect that is known to the Contractor because of a use or disclosure of personal information by the Contractor. A log of all disclosures made of personal information received from the State, or personal information created or received by the Contractor on behalf of the State shall be maintained by the Contractor.

### **3.4 Payment**

Pursuant to HRS §103-10, the State shall have thirty (30) calendar days after receipt of invoice or satisfactory completion of projects 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.

The State will not recognize any requirement established by the Contractor and communicated to the State after the award of the contract, which requires payment within a shorter period or interest payment not in conformance with the statute.

### **3.5 Payment to Hawaii Information Consortium, LLC (HIC)**

HlePRO is administered by Hawaii Information Consortium, LLC (HIC). HIC shall invoice the Contractor(s) directly for payment of transaction fees. Payment must be made to HIC within thirty (30) days from receipt of invoice. HIC is an intended third-party beneficiary of transaction fees, which are used to fund the operation, maintenance and future enhancements of the HlePRO system.

## **Section 4: Instructions to Offerors – Proposal Submission**

### **4.1 Proposal Structure and Labeling**

Proposals must be detailed and concise. Each Proposal must be labeled and organized in a manner that is congruent with the requirements and terminology used in this RFP and must include a point by point response, structured in form and reference to the RFP, addressing all requirements and the Scope of Work elements.

### **4.2 Proposal Submission Instructions**

Proposals must be received by May 25, 2020 at 2:00 pm Hawaii Standard Time through HlePRO. Proposals received after the deadline and/or through any sources other than HlePRO will be rejected.

### 4.3 Electronic Submission of Proposals

Proposals shall be submitted and received electronically through HlePRO by the date and time listed in Section Schedule and Significant Dates. This electronically submitted offer shall be considered the original. Any offers received outside of the HlePRO, including faxed or e-mailed bids, shall not be accepted or considered for award. Any offer received after the due date and time shall be rejected. **The maximum file size that HlePRO can accept is 100MB. Files larger than 100MB must be reduced into two or more files.**

Submission of a proposal shall constitute an incontrovertible representation by the Offeror that the Offeror agrees to comply with every requirement of this RFP, and that the RFP documents are sufficient in scope and detail to indicate and convey a reasonable understanding of all terms and conditions of performance of the work.

### 4.4 Required Format and Content

All Proposals must be submitted in the following format. Detailed information on submitting each of these sections is contained in later sections of this RFP. Proposal shall be submitted in size 12 Arial font or equivalent.

- 1) **Offer Checklist.** Complete and submit all items noted on the Offer Checklist.
- 2) **Offer Form, OF-1, OF-2, OF-3.** Offeror shall complete and sign OF-1, 2, 3 Offer Forms. See Special Provisions, Section 8.7 Proposal Preparation.
- 3) **Table of Contents.** A Table of Contents must be included with each proposal. All major parts of the proposal shall be identified by referencing page number.
- 4) **Executive Summary.** The executive summary not to exceed two (2) page(s) is to briefly describe the Offeror's Proposal. This summary should highlight the major features of the Proposal. The response should demonstrate the Offeror's understanding of and ability to meet the Administrative and Technical Requirements of the RFP. The State should be able to determine the essence of the Proposal by reading the executive summary.
- 5) **Evaluation Criteria Submittals (Refer to Section 5: Evaluation and Award).** This section shall be sub-divided by the evaluation criteria and include the narrative and any other requirements.
  - a) Management Approach – See Section 6.1 Management Approach Submittal limited to three (3) pages
  - b) Technical – See Section 6.2 Technical Approach Submittal limited to three (3) pages
  - c) Past Performance – See Section 6.3 Past Performance Submittal limited to two (2) pages

d) Price Proposal -- See Section 6.4 Price Evaluation. Offeror shall complete the attached OF-3 Pricing Form in which Offeror shall submit all price line items excluding all applicable taxes.

**Confidential, Protected or Proprietary Information.** Information included in the Confidential, Protected or Proprietary Information section of an Offeror's proposal is not automatically accepted as protected. All information identified in the section will be subject to review by the State in accordance with the procedures prescribed by the State's open records statute, freedom of information act, or similar law.

## **Section 5: Evaluation and Award**

### **5.1 Evaluation of Proposals**

The Procurement Officer of the Department of Accounting and General Services (DAGS), or an evaluation committee of at least three (3) qualified State employees selected by the DAGS Procurement Officer, shall evaluate proposals for the contract. The evaluation will be based solely on Section 5.8 Evaluation Criteria and the process described in this section.

### **5.2 Right to Waive Minor Irregularities**

The State in its sole discretion reserves the right to waive minor irregularities in the Proposal, which include but are not limited to corrections of deficiencies or clarification of ambiguities that in the judgment of the State do not require a comprehensive proposal rewrite. The State also reserves the right in its sole discretion to waive certain minimum requirements provided that all of the otherwise responsive proposals fail to meet the same minimum requirements and the failure to do so does not materially affect the procurement.

### **5.3 Initial Review and Award without Discussions**

In the initial phase of the evaluation process, the State will review all proposals timely received. Unacceptable proposals (non-responsive proposals not conforming to RFP requirements) will be eliminated from further consideration.

The State reserves the right to award contract for services on receipt of initial proposals without an opportunity for discussion or proposal revision, so Offerors are encouraged to submit their most favorable proposal at the time established for receipt of proposals. Offerors shall be accorded fair and equal treatment with respect to any opportunity for discussion and/or written revisions of proposals.

### **5.4 Discussion with Priority Listed Offerors**

Prior to holding any discussions, a priority list shall be generated consisting of proposals determined to be acceptable or potentially acceptable.

If numerous acceptable and potentially acceptable proposals are submitted, the evaluation committee may limit the priority list to the three (3) highest ranked, responsible Offerors.

The State may invite priority listed Offerors to discuss their proposals to ensure there is a thorough, mutual understanding of the parties. The State in its sole discretion shall schedule the time and location for these discussions, generally within the timeframe indicated in Section Schedule and Significant Dates. The State may also conduct discussions with priority listed Offerors to clarify issues regarding the proposals before requesting Best and Final Offers (BAFO), if necessary.

In conducting discussions, there shall be no disclosure of any information derived from proposals submitted by competing Offerors.

## **5.5 Best and Final Offers**

If deemed appropriate by the State in its sole discretion, the State may request each Offeror to submit its BAFO. The request shall be issued via an Addendum, which will provide guidance and additional instructions. Offeror's BAFOs shall be submitted to the State through HlePRO on or before the deadline provided. If an Offeror fails to meet the deadline, the Offeror's last submitted Offer shall be deemed its BAFO.

The BAFOs will be evaluated by the Evaluation Committee in accordance with the Evaluation Criteria set forth in Section **5.8 Evaluation Criteria**.

## **5.6 Award of Contract**

Award shall be made to the responsible Offeror whose proposal is determined the most advantageous to the State of Hawaii, taking into consideration price and the other evaluation factors set forth in this request for proposals.

## **5.7 Responsibility of Offeror**

Pursuant to HRS §103D-310(c), the selected offeror shall at the time of award be compliant with all laws governing entities doing business in the State of Hawaii. See Special Provisions, Section 8.6 Responsibility of Offerors.

## **5.8 Evaluation Criteria**

The following criteria shall be used in evaluating the Offerors:

**Table 1 - Evaluation Criteria**

<b>Evaluation Category</b>	<b>Evaluation Subcategory</b>	<b>Points Possible</b>
Evaluation Criteria 1: Management Approach	Experience Submittal (Max 3 Pages) in addition to resumes of key personnel;	25
Evaluation Criteria 2: Technical Approach	Technical Submittal (Max 5 Pages)	25
Evaluation Criteria 3: Past Performance	Client References	25
Evaluation Criteria 4: Price	Price Proposal	25
<b>Total Possible Points</b>		<b>100</b>

### **5.9 Scoring Process**

The evaluation committee shall score proposals by reviewing the narrative for each of the evaluation criteria above.

Evaluators shall use a rating of 0 to 5 for each evaluation criteria. Rating is defined as follows:

- 0- The Proposal fails to address the criterion or cannot be assessed due to missing or incomplete information. Offeror has not demonstrated sufficient knowledge of the subject matter or has grossly failed to explain how the requirement(s) is met.
- 1- **Poor.** The criterion is inadequately addressed, Offeror demonstrates only a slight ability to comply, or there are serious inherent weaknesses.
- 2- **Fair.** The Proposal broadly addresses the criterion, but there are significant weaknesses. May have one or more deficiencies, or Offeror has not adequately explained how its services fit the requirement.
- 3- **Good.** The Proposal addresses the criterion well; meets the requirement. Demonstrates knowledge and understanding of the subject matter, with no deficiencies noted regarding technical approach.
- 4- **Very Good.** The Proposal addresses the criterion very well, highly comprehensive. No deficiencies noted.
- 5- **Excellent.** The Proposal successfully addresses all relevant aspects of the criterion. Excellent reply that goes beyond the requirements listed in the RFP to provide added value. In addition, the response may cover areas not originally addressed within the RFP and/or include additional information and recommendations that would prove both valuable and beneficial to the agency.



The response includes a full, clear, detailed explanation of how the requirement(s) are met. No errors in technical writing.

The average of each evaluators' rating for each evaluation criteria shown in Table 1, shall be converted based on the following formula:

<b>Rate Achieved</b>	X	Points Possible For that Criteria	= Points
Total Rating Achievable			

### 5.10 Notice of Award

After a final selection is made, the State will issue a notice of award on its electronic procurement system (HlePRO). Upon award, proposal files are public records and are available for review by submitting a Request for Access to Government Record. Information on the Office of Information Practices and forms may be found at <http://oip.hawaii.gov>.

### 5.11 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 of the contract. The Procurement Officer or designee shall hold the debriefing within seven (7) working days to the extent practicable from the receipt date of the written request.

A protest by the requestor following a debriefing shall be filed within five (5) working days, as specified in HAR §103D-303(h). See Special Provisions Section 8.12 Protest Procedures for submitting a protest.

## Section 6: Evaluation Criteria

### Evaluation Criteria 1: Management Approach

#### 6.1 Management Approach Submittal

This section contains requirements pertaining to the Offeror's management approach and experience relating to this RFP. The Offeror shall submit a narrative of a maximum of three (3) pages showing how they met or exceeded requirements of previous work, project examples, etc. Narratives are to be submitted in 12 pt. Arial font or equivalent.

At a minimum, submittal shall include project examples that describe: the recruiting plan, the number of key employees assigned, and duration of time from start to completion.

### **6.1.1 Scope of Work**

A full narrative shall explain how Offeror meets or exceeds the requirements of each section of Attachment A, Scope of Work. The Offeror must explain its prior experience providing the types of services requested by this RFP. Describe at least three major projects or contracts you worked on during the past three years, on the same or similar projects. Explain the scope of work, duration, number of employees assigned to the project, and significant tasks that were completed.

## **Evaluation Criteria 2: Technical Approach**

### **6.2 Technical Approach Submittal**

This section contains requirements pertaining to the offeror's technical experience with PeopleSoft relating to this RFP. Offeror shall submit a narrative of a maximum of three (3) pages explaining their plan to meet the technical experience requirement, amount of key personnel allocated, the methodology toward implementing and tracking the success of requirements. Narratives are to be submitted in 12 pt. Arial font size or equivalent.

At a minimum, include examples of projects using PeopleSoft that the Offeror has completed.

#### **6.2.1 Scope of Work**

A full narrative shall explain how Offeror meets or exceeds the requirements of each section of Attachment A, Scope of Work. The Offeror must list its technical knowledge of PeopleSoft as it relates to the typed of services requested by this RFP. Describe at least three major contracts involving PeopleSoft you worked on during the past three (3) years, on the same or similar projects.

## **Evaluation Criteria 3: Past Performance**

### **6.3 Past Performance Submittal**

Offeror shall submit a narrative of a maximum of two (2) pages not including references. Narratives are to be submitted in size 12 pt. Arial font or equivalent. Offeror shall provide a full narrative to describe past performance establishing the company submitting the proposal has the qualifications and experience to provide the services specified in this RFP.

Offeror shall complete Offer Form OF-2 Client References, Attachment C with the names and contact information of customer references for at least three (3) references of clients that received services that are similar to those in the scope of work.

The State reserves the right to conduct reference checks beyond what was provided by references.

The results of the reference checks will be reflected in the evaluation score for this criterion. Full points will not be awarded without confirmation of services from at least three (3) references/clients. Offerors are encouraged to notify references with due notice.

### **6.3.1 Past Performance Relevancy and Recency Ratings**

The State will evaluate the Offeror's demonstrated record of contract performance in supplying services that meet users' needs, including price and schedule. The recency and relevancy of the information, the source of the information, the context of the data and general trends in the Contractor's performance will be considered. More recent and more relevant performance usually has a greater impact on the confidence assessment than less recent and less relevant performance. The State will perform an independent determination of relevancy of the data provided or obtained. A relevancy determination will be made in addition to the reference responses received. The State is not bound by the Offeror's opinion of relevancy.

The following relevancy criteria apply and will be assigned to each effort identified in the Offeror's proposal on past performance.

**Table 2 – Past Performance Relevancy Rating**

<b>Rating</b>	<b>Definition</b>
Very Relevant	Present/past performance effort involved essentially the same scope and magnitude of effort and complexities this solicitation requires.
Relevant	Present/past performance effort involved similar scope and magnitude of effort and complexities this solicitation requires
Somewhat Relevant	Present/past performance effort involved some of the scope and magnitude of effort and complexities this solicitation requires.
Not Relevant	Present/past performance effort involved little or none of the scope and magnitude of effort and complexities this solicitation requires.

Very Relevant– Has provided all services in present/past performance effort involved essentially the same scope and magnitude of effort and complexities this solicitation requires.

Relevant– Has provided some services in present/past performance effort involved essentially the same scope and magnitude of effort and complexities this solicitation requires.

Somewhat Relevant - Has provided few services in present/past performance effort involved essentially the same scope and magnitude of effort and complexities this solicitation requires.

Not Relevant: Present/past performance effort involved little or none of the scope and magnitude of effort and complexities this solicitation requires.

For purposes of this evaluation, recency is defined as active or completed efforts performed within the past three (3) years from the closing date of this solicitation. The more recent the effort the higher recency score it will receive, as follows:

**Table 3 – Past Performance Recency Rating**

<b>Rating</b>	<b>Definition</b>
Very Recent	Completion of a service project within the last six (6) months to one (1) year
Recent	Completion of a service project within the last one (1) year to two (2) years
Not Recent	Completion of a service project within the last two (2) years to (3) years

## **Evaluation Criteria 4: Price**

### **6.4 Price Evaluation**

The Offeror's price proposal is worth 25% of the 100 total points. Offerors shall enter the total sum price for five (5) full-time agents and one (1) full-time supervisor for one (1) year of services as the Unit Price in US Dollars and Cents when submitting their offer in HlePRO. 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.

#### **6.4.1 Cost Points Conversion**

In converting cost to points, the Lowest Total Cost will automatically receive the maximum number of points allocated to cost shown in Table 1 in Section 5.8. The point allocations for cost on the other Offers for each service category will be determined through the method set out in the following formula:  $[\text{Lowest Total Cost} \text{ multiplied by maximum points} \text{ divided by } [\text{Offeror's Proposed Cost}]] = \text{Cost Points Awarded}$ .

#### **6.4.2 Price and Rate Guarantee Period**

All prices shall be guaranteed for the first year as part of the contract. If the contract is extended upon mutual agreement in writing between the State and the Contractor, adjustments to the hourly rate not to exceed the inflation rate as calculated by the Consumer Price Index may be negotiated.

## **Section 7: Contract Management**

Contract management refers to post-award type activities, such as contract implementation, contract administration, measurement of work completion and payment computation. Moreover, it involves the monitoring of a contract, making important changes and modifications to the contract and dealing with related problems. Activities in contract management facilitate a positive working relationship between the government customer, procurement staff, and the contractor for the successful implementation of the contract award.

### **7.1 Contract Administration**

The State will provide training and specific requirements for delivery of services under the contract. The State will measure the quality and quantity of calls and inquiries that the service agents perform using established technology and toolsets already in place and in working order.

The required schedule will be adjusted based on key critical milestones that relate to increases in operational needs in addition to the roll out of additional enterprise

functionality to departments and its employees. In addition to operational peaks related to payroll processing, quarterly and annual updates there will also be time and leave processing deadlines that will be integrated into the payroll processing schedule. The State anticipates that the call volume in the service center will peak at each deployment cycle, during the on-boarding, go-live and post-go live phases. Deployment phases for time and leave begin May 2020 and continue to October 2020 and March 2021.

The State will also solicit feedback from departments and employees periodically to measure service levels and quality of service. Roles and responsibilities are outlined in the State's operational procedures and policies.

The State will identify the appropriate parties to manage issue resolution.

## **7.2 Dispute Process and Escalation**

The State and the contractor shall develop a dispute resolution process at the initial contractor meetings, to address any issues or concerns that may occur during the transition/implementation stage or at any time throughout the contract period.

## **7.3 Post Award Requirements**

The State shall require the awarded contractor to adhere to post-award activities. Post-award activities include the following:

- 1) Contractor will need to meet all State clearance requirements.
- 2) Service agents will be required to review and sign a Non-Disclosure Agreement (NDA) as they will have access to employee personal information and details in order to provide support of Employee Self-Service and Manager Self-Service functions in the enterprise system.
- 3) All service agents will be interviewed and provided a description of job duties and aptitudes.

## **7.4 Quality Control**

The Contractor shall provide quality services and management oversight of all processes. The Contractor shall provide accurate data/reports and meet deliverables, with emphasis on the overall success and positive impact on the HIP Service Center Support. The Contractor shall provide management, support, and qualified personnel to accomplish the objectives of this contract.

Quality of the Help Desk representatives will be monitored and evaluated using the recorded calls stored in TalkDesk and listening along to live calls in real time. Data gathered from TalkDesk will also be used to evaluate individual representatives' performance to include average time to answer a call, average length of call, and average response time to HIP emails.

## **7.5 Contract Administrator**

The Contract Administrator identified below is the single point of contact (POC) **post-award**. The Contractor shall direct to the Contract Administrator all questions concerning the post-award process and any other questions that may arise related to the resulting contract. The Contract Administrator designated by the State of Hawaii, Department of Accounting and General Services is:

Lenora Fisher  
Accounting Administrator  
Accounting Division  
1151 Punchbowl St. Suite 320, Honolulu, HI 96813  
lenora.d.fisher@hawaii.gov  
Phone: 808-586-0600

## **7.6 Contractor/State Meetings**

The Contractor shall participate in initial meetings with the State to discuss the contract, including but not limited to; an estimated timeline for transition and implementation, status reports of the transition and implementation, recruitment plan, training sessions, and follow-up meetings. Once service is successfully initiated, contractor/state meetings will be scheduled as needed, however, at a minimum performance and service delivery will be reviewed once a month.

## **7.7 Performance Management Plan (PMP)**

The Contractor shall develop and maintain throughout the contract, a Performance Management Plan (PMP) that shall be used as a foundation for technical direction, resources management planning and the method of assuring quality performance during this contract.

The PMP shall include, but not be limited to, the following information:

- Planned initiatives and key recruiting events
- Staffing Plan
- Contractor/Government Organizational relationships

The PMP shall be approved by the Post Award Contract Administrator (PACA), and there will be no deviation from the PMP, unless agreed to by the Contractor and PACA. Where the Contractor identifies deviations from the plan, the Contractor shall provide the supporting rationale necessitating the deviation, in a written submission to the PACA. It is the Contractor's responsibility to keep the PMP up-to-date.

Deliverable: The Performance Management Plan shall be submitted for approval to the PACA no later than ten (10) days after contract award.

## 7.8 Key Performance Indicators (KPIs)

Within ten (10) days of the start of the contract, the Contractor shall have no less than two (2) agents and one (1) agent supervisor on site and working full time. Within thirty (30) days of the start of the contract, the Contractor shall have no less than five (5) agents and one (1) agent supervisor on site and working full time.

## 7.9 Post Award Deliverables

The contractor shall provide, upon request of the State, the following, including but not limited to deliverable items:

RFP Reference	Due Date	Deliverable	Action Required
Section 8.15 Liability Insurance	Prior to the start of the contract	Liability Insurance Certificates	Contractor shall maintain during the life of the contract.

## Section 8: Special Provisions

### 8.1 Scope

The scope of work includes the temporary staffing of PeopleSoft helpdesk support physically located at the State of Hawaii Department of Accounting and General Services' site: Kalanimoku Building, 1151 Punchbowl Street, Honolulu, HI 96813. The "HIP Service Center" provides phone and email support to State of Hawaii employees using the State's Oracle PeopleSoft system known as the Hawaii Information Portal (HIP). Services are provided Monday through Friday, 7:45am to 4:40pm excluding State holidays which are incorporated by reference at: <https://dhrd.hawaii.gov/state-observed-holidays/>. HIP Service Center answers State of Hawaii employee questions regarding the Peoplesoft software that functions as the State's system of record for human resources, payroll, time, and leave data, and manages employees' security access to the system.

### 8.2 Acceptance

Prior to the start of work of any individual working at the HIP Service Center, the State will require 1) a copy of the individual's resume with details of their education and work experience; 2) two (2) professional references; and 3) an in-person interview with State representatives to gauge their experience, temperament and interpersonal skills. The State has the right to refuse any individual who does not meet the State's screening process. The Contractor shall conduct a background check on each individual and confirm clearance with the State's representatives prior to the start of work of any individual.

The State reserves the right to have the Contractor remove any individual working at the



HIP Service Center for any reason, include but not limited to unprofessional conduct or appearance, a breach of security or privacy, failure to follow State policies and procedures, poor customer service, or underperformance. Immediate removal and revocation of security access to IT systems and premises may be required with little notice. Upon doing so, the Contractor must seek a replacement for the individual being dismissed within a reasonable timeframe.

### **8.3 Termination for Convenience or Unavailability of Funds**

The State reserves the right to terminate the contract for convenience or due to the unavailability of funds with thirty (30) days written notice to the Contractor.

### **8.4 Preferences**

There are no preferences associated with this RFP.

### **8.5 Certification of Offeror Concerning Wages, Hours and Working Condition of Employees Supplying Services**

All Offerors for service contracts shall comply with section HRS §103-55, which provides as follows:

Wages, hours, and working conditions of employees of CONTRACTOR supplying services: Before any prospective Offeror is entitled to submit an offer for the performance of any contract to supply services in excess of \$25,000 to any governmental agency, Offeror shall certify that the services to be performed will be performed under the following conditions:

Wages: The services to be rendered shall be performed by employees paid at wages or salaries not less than the wages paid to public officers and employees for similar work.

Compliance with labor laws: All applicable laws of the Federal and State governments relating to workers compensation, unemployment compensation, payment of wages, and safety will be fully complied with.

No contract to perform services for any governmental contracting agency in excess of \$25,000 shall be granted unless all the conditions of this section are met. Failure to comply with the conditions of this section during the period of the contract to perform services shall result in cancellation of the contract.

It shall be the duty of the Department of Accounting and General Services (DAGS) to enforce this section.

## **8.6 Responsibility of Offerors**

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 including the following chapters and pursuant to Hawaii Revised Statutes HRS §103D-310(c):

- 1) Chapter 237, General Excise Tax Law;
- 2) Chapter 383, Hawaii Employment Security Law;
- 3) Chapter 386, Worker's Compensation Law;
- 4) Chapter 392, Temporary Disability Insurance;
- 5) Chapter 393, Prepaid Health Care Act; and
- 6) §103D-310(c), Certificate of Good Standing (COGS) for entities doing business in the State.

### **8.6.1 Vendor Compliance - Hawaii Compliance Express (HCE)**

Vendors may use the Hawaii Compliance Express (HCE), which is an electronic system that allows vendors/Contractors/service providers doing business with the State to quickly and easily demonstrate compliance with applicable laws. It is an online system that replaces the necessity of obtaining paper compliance certificates from the Hawaii State Department of Taxation (DOTAX), Federal Internal Revenue Service (IRS), Department of Labor and Industrial Relations (DLIR), and Department of Commerce and Consumer Affairs (DCCA).

### **8.6.2 Timely Registration on HCE**

Vendors/Contractors/service providers intending to use the HCE to demonstrate compliance are advised to register on HCE as soon as possible at <https://vendors.ehawaii.gov>. The annual registration fee is \$12.00 and the 'Certificate of Vendor Compliance' is accepted for the execution of a contract and final payment. If a vendor/Contractor/service provider is not compliant on HCE at the time of award, the Offeror will not receive the award.

### **8.6.3 Verification of Compliance on the HCE**

Prior to awarding this contract, the State shall verify compliance of the Offeror.

### **8.6.4 Vendor Compliance - Paper Documents**

Vendors not utilizing the HCE to demonstrate compliance shall provide the paper certificates to the Lead State as instructed below. All certificates must be valid on the date it is received by the Department of Accounting and General Services (DAGS). Timely applications for all applicable clearances are the responsibility of the Offeror.

#### **8.6.4.1 HRS Chapter 237 Tax Clearance Requirement for Award**

Pursuant to Section 103D-328, HRS, the Offeror shall be required to submit a tax clearance certificate issued by DOTAX and the IRS. The certificate shall have an original green certified copy stamp and shall be valid for six (6) months from the most recent approval stamp date on the certificate.

The *Tax Clearance Application*, Form A-6, and its completion and filing instructions, are available on the DOTAX website: <http://tax.hawaii.gov/forms/>.

#### **8.6.4.2 HRS Chapters 383 (Unemployment Insurance), 386 (Workers' Compensation), 392 (Temporary Disability Insurance), and 393 (Prepaid Health Care) requirements for award**

Pursuant to Section 103D-310(c), HRS, the Offeror shall be required to submit a certificate of compliance issued by the DLIR. The certificate is valid for six (6) months from the date of issue. A photocopy of the certificate is acceptable for submission to DAGS.

The *DLIR Form LIR#27 Application for Certificate of Compliance with Section 3-122-112, HAR*, and its filing instructions are available on the DLIR website: <http://labor.hawaii.gov/forms/>.

#### **8.6.5 Compliance with Section 103D-310(c), HRS, for an entity doing business in the State**

The Offeror shall be required to submit a *Certificate of Good Standing (COGS)* issued by DCCA - Business Registration Division (BREG). The Certificate is valid for six (6) months from date of issue. A photocopy of the certificate is acceptable for submission to DAGS.

To obtain the certificate, the Offeror must be registered with the BREG. A sole proprietorship is not required to register with the BREG and is therefore not required to submit the certificate.

For more information regarding online business registration and the COGS is available at <http://cca.hawaii.gov/breg/>.

#### **8.6.6 Timely Registration**

The above certificates should be applied for and submitted to the State as soon as possible. If a valid certificate is not submitted on a timely basis for award of a contract, an Offeror otherwise responsive, may not receive the award.

### **8.6.7 Verification of Compliance**

Upon receipt of compliance documents (A-6, LIR#27, COGS), the State reserves the right to verify their validity with the respective issuing agency. The Contractor shall maintain their compliance throughout the term of the contract.

### **8.6.8 Required Review**

Before submitting a proposal, each Offeror must thoroughly and carefully examine this RFP, any attachment, addendum, and any other relevant document, to ensure Offeror understands the requirements of the RFP. Offeror must also become familiar with State, local and Federal laws, statutes, ordinances, rules, and regulations that may in any manner affect cost, progress, or performance of the work required.

Should Offeror find defects and questionable or objectionable items in the RFP, Offeror shall notify the State in writing prior to the deadline for written questions as stated in the Section Schedule and Significant Dates, as amended. This will allow the issuance of any necessary corrections and/or amendments to the RFP by addendum and mitigate reliance on a defective solicitation and exposure of proposal(s) upon which award could not be made.

## **8.7 Proposal Preparation**

### **8.7.1 Offer Form OF-1**

Offer Form OF-1, Attachment B, is required to be completed using Offeror's exact legal name as registered with the Department of Commerce and Consumer Affairs, if applicable, in the appropriate space on OFFER FORM page OF-1.

The Offeror's authorized signature on the OFFER FORM, OF-1 shall be an original signature in ink, which shall be required before an award, if any, can be made. The submission of the proposal shall indicate Offeror's intent to be bound.

Completion of Offer Form OF-1 is Offeror's acknowledgement and agreement to provide services in all categories identified in the RFP, agreement to provide services in all fifty states, and its understanding of evaluation criteria and process.

### **8.7.2 Offer Guaranty**

An offer guaranty is NOT required for this RFP.

### **8.7.3 Tax Liability**

Work to be performed under this solicitation is a business activity taxable under HRS Chapter 237, and if applicable, taxable under HRS Chapter 238. Offerors are

advised that they are liable for the Hawaii General Excise Tax (GET) at the current 4.712% for transactions made on Oahu and Kauai, 4.438% for transactions made on the island of Hawaii, and 4.166% for transactions made on the islands of Maui, Molokai, and Lanai. If, however, an Offeror is a person exempt by the HRS from paying the GET and, therefore, not liable for the taxes on this solicitation, the Offeror shall state its tax-exempt status and cite the HRS chapter or section allowing the exemption.

#### **8.7.4 Federal I.D. No. and Hawaii General Excise Tax License I.D**

Offeror shall submit its current Federal I.D. No. and Hawaii General Excise Tax License I.D. number in the space provided on OFFER FORM, page OF-1, Attachment B, thereby attesting that the Offeror is doing business in the State and that Offeror will pay such taxes on all sales made to the State.

### **8.8 Confidentiality**

- 8.8.1** If an Offeror in good faith considers a portion of an Offer, or correspondence with the State, to contain confidential information, it shall follow the procedures set forth in Section 4.4 Required Format and Content. Costs included or required to be included in an Offer cannot be confidential and will not be withheld from public access.
- 8.8.2** Any Offeror may request the nondisclosure of designated trade secrets or other proprietary data it considers confidential. Such request shall be in writing specifically identifying the information or material asserted to be confidential and the justification for confidential treatment. The request shall be submitted with the submission of the Offer. The information or material asserted by the Offeror to be confidential to the Offeror shall be clearly marked and be submitted in or with the Offer in such manner as to be readily separable from the Offer (or remaining portion of the Offer) to facilitate public access to and inspection of the non-confidential portion of the Offer. Total Cost proposals cannot be marked confidential.
- 8.8.3** Pursuant to HAR §3-122-58, the State will consult with the Attorney General regarding an Offeror's request for confidentiality of part of its Offer. The Attorney General shall determine what portions of the request are confidential under Law and what portions are not, in accordance with HRS Chapter 92F. The State shall communicate the Attorney General's determination to the Offeror in writing. If the request for confidentiality is denied in whole or in part, the information or material deemed to be non-confidential shall be made available as public information unless the Offeror appeals pursuant to HRS § 92F-42(1).

## **8.9 Redaction by the State**

If the State determines, pursuant to HRS §92F-13, that any information or material in an Offer, any written question or submission by a Prospective Offeror, an Offeror or a Contractor, any response to any question or submission from a Prospective Offeror, Offeror or Contractor, and/or any Contract document is not required to be disclosed, then the State shall segregate, or redact, or otherwise cause any such information or material to not be made available as public information.

## **8.10 Proposal Objectives**

One of the objectives of this RFP is to make proposal preparation easy and efficient while giving Offerors ample opportunity to highlight their proposals. The evaluation process must also be manageable and effective.

Proposals shall be prepared in a straightforward and concise manner, in a format that is reasonably considered and appropriate for the purpose. Emphasis will be on completeness and clarity and content.

When an Offeror submits a proposal, it shall be considered a complete plan for accomplishing the tasks described in this RFP and any supplemental tasks the Offeror has identified as necessary to successfully complete the obligations outlined in this RFP.

The proposal shall describe in detail the Offeror's ability and availability of services to meet the goals and objectives of this RFP.

## **8.11 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.

## **8.12 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:

Lenora Fisher  
Accounting Administrator  
Accounting Division  
1151 Punchbowl St. Suite 320, Honolulu, HI 96813

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 in writing prior to the date set for receipt of offers. Further provided that a protest of an award or proposed award shall be submitted within five (5) working days after the posting of award or if requested, within five (5) working days after the Procurement Officer's debriefing was completed.

The notice of award, if any, resulting from this solicitation shall be posted on the State of Hawaii electronic procurement site.

### **8.13 Notice to Proceed**

Work will commence on the official commencement date specified on the Notice to Proceed.

### **8.14 Contract Execution**

The successful Offeror receiving the award shall enter into a formal written contract to be signed by the Offeror and returned within ten (10) working days.

No performance or payment bond is required for this contract.

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

If an option to extend is mutually agreed upon, the Offeror shall be required to execute a supplemental contract for the additional extension period.

### **8.15 Liability Insurance**

The Contractor shall maintain in full force and effect during the life of this contract, liability and property damage insurance to protect the Contractor from claims for damages for personal injury, accidental death and property damage which may arise from operations under this contract.

The following minimum insurance coverage(s) and limit(s) shall be provided by the Contractor where appropriate.

<b><u>Coverage</u></b>	<b><u>Limits</u></b>
Commercial General Liability (Occurrence form)	\$1,000,000 per occurrence \$2,000,000 aggregate

Professional Services Liability Insurance shall be required to insure against damages and claim expenses as a result of claims arising or alleged wrongful acts in performing services. The minimum required is \$1,000,000 per occurrence and \$2,000,000 in the aggregate.

Workers' Compensation and Employers' Liability insurance as required by current Hawaii law and regulations thereunder, as the same may be amended from time to time, for all employees, if any, of the Contractor. The Contractor shall maintain in force and effect the following insurance coverages with minimum limits as follows:

<u>Workers' Compensation</u>	Hawaii statutory limits	
<u>Employer's Liability</u>		
Bodily Injury By Accident	\$100,000.00	Each Accident
Bodily Injury By Disease	\$500,000.00	Policy Limit
Bodily Injury By Disease	\$100,000.00	Each Employee

Each insurance policy required by this contract (with the exception of the Professional Liability policy), shall contain the following clauses:

- A. "The State of Hawaii is added as an additional insured as respects to operations performed for the State of Hawaii."
- B. "It is agreed that any insurance maintained by the State of Hawaii will apply in excess of, and not contribute with, insurance provided by this policy."

A Waiver of Subrogation shall apply to the General Liability, Automobile Liability and Worker's Compensation insurance policies and shall be in favor of the State of Hawaii.

Prior to award, the Contractor agrees to deposit with the State of Hawaii certificate(s) of insurance necessary to satisfy the State that the insurance provisions of this RFP have been complied with and to keep such insurance in effect and the certificate(s) therefore on deposit with the State during the entire term of the price list and price list extensions, if any. Upon request by the State, Contractor shall be responsible for furnishing a copy of the policy or policies.

Failure of the Contractor to provide and keep in force such insurance shall be regarded as material default, entitling the State to exercise any or all of the remedies provided in the contract and this RFP for default by the Contractor.

The procuring of such required insurance shall not be construed to limit the Contractor's liability hereunder nor to fulfill the indemnification provisions and requirements of this RFP. Notwithstanding said policy or policies of insurance, the Contractor shall be obliged for the full and total amount of any damage, injury, or loss caused by negligence or neglect connected with the delivery of services for the stated cost.



## **8.16 Contract Invalidation**

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

## **59T8.17 Mistakes in Proposals**

**8.17.1** Mistakes shall not be corrected after award of contract.

**8.17.2** When the Procurement Officer knows or has reason to conclude before award that a mistake has been made, the Procurement Officer may request the offeror to confirm the proposal. If the Offeror alleges mistake, the proposal may be corrected or withdrawn pursuant to this section.

**8.17.3** 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, in which event the proposal may not be withdrawn.

**8.17.4** If discussions are not held, or if the best and final offers upon which award will be made have been received, an Offeror alleging a material mistake of fact which makes a proposal non-responsive may be permitted to withdraw the proposal if: the mistake is clearly evident on the face of the proposal but the intended correct offer is not; or the Offeror submits evidence which clearly and convincingly demonstrates that a mistake was made.

Technical irregularities are matters of form rather than substance evident from the proposal document, or insignificant mistakes that can be waived or corrected without prejudice to other Offerors; that is, when there is no effect on price, quality, or quantity. If discussions are not held or if best and final offers upon which award will be made have been received, the Procurement Officer may waive such irregularities or allow an Offeror to correct them if either is in the best interest of the State. Examples include the failure of an Offeror to: return the number of signed proposals required by the request for proposals; sign the proposal, but only if the unsigned proposal is accompanied by other material indicating the Offeror's intent to be bound; or to acknowledge receipt of an amendment to the request for proposal, but only if it is clear from the proposal that the Offeror received the amendment and intended to be bound by its terms; or the amendment involved had no effect on price, quality or quantity.

## **59T8.18 Modification Prior to Submittal Deadline or Withdrawal of Offers**

**8.18.1** The Offeror may modify or withdraw a proposal before the proposal due date and time.

**8.18.2** Any change, addition, deletion of attachment(s) or data entry of an Offer may be made prior to the deadline for submittal of offers

### **59T8.19 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 for accomplishing the additional work and a firm price for the additional work.

Contractor will not commence additional work until the Contract Administrator has secured the required State approvals necessary for the amendment and an executed written contract amendment has been issued.

## **ATTACHMENT A**

### **Scope of Work**

The scope of work includes the temporary staffing of PeopleSoft helpdesk support physically located at the State of Hawaii Department of Accounting and General Services' site: Kalanimoku Building, 1151 Punchbowl Street, Honolulu, HI 96813. The "HIP Service Center" provides phone and email support to State of Hawaii employees using the State's Oracle PeopleSoft system known as the Hawaii Information Portal (HIP). Services are provided Monday through Friday, 7:45am to 4:40pm excluding State holidays which are incorporated by reference at: <https://dhrd.hawaii.gov/state-observed-holidays/>. HIP Service Center answers State of Hawaii employee questions regarding the Peoplesoft software that functions as the State's system of record for human resources, payroll, time, and leave data, and manages employees' security access to the system.

The Offeror shall provide and five (5) full-time equivalent "agents" who will handle customer calls and emails, and one (1) full-time equivalent on-site supervisor for the duration of the contract that shall perform all of the tasks of the agents, plus customer escalations via email or phone, act as the main point of contact for the State's Contract Administrator, and provide quality assurance among the agents.

During certain periods of the year, the number of calls and emails may be higher than normal. The Offeror shall provide seven (7) agents during these timeframes:

- October 1 – November 30, 2020
- January 15 – February 7, 2021
- March 1 – 30, 2021
- September 1 – October 30, 2021
- January 15 – February 7, 2022
- January 15 – February 7, 2023

The vendor must provide the desired number of full-time or equivalent employees to meet the demands of the project, as determined by the Department of Accounting and General Services (DAGS).

The vendor must provide employees who have PeopleSoft or equivalent HR/Payroll/Time and Leave software experience.

The vendor shall complete background screening of customer service representative candidates prior to commencing work with DAGS. Background screening shall include, at minimum:

- 1) Education, qualification and background verification – highest degree earned;

- 2) Qualification verification – number of years of data entry or equivalent system update experience;
- 3) Employment verification – last TWO (2) employers;
- 4) Reference check – TWO (2) professional references; and
- 5) Background check – no conviction of a violation of any law.

The vendor shall incorporate resumes of customer service representative candidates to DAGS for consideration and review with the proposal. The State of Hawaii reserves the right to accept or reject candidates proposed for selection.

Agents who staff the Service Center must be able to assist callers, based on their specific roles, in all of the following scenarios with payroll and time and leave administration. The Standard Operating Policies and Procedures listed below are samples of likely scenarios. The State reserves the right to add or modify the scenarios to accurately reference the system process, screens and associated workflow.

**Detailed Agent Standard Operating Procedures and Policies** Appendices referred to herein to be provided upon contract execution.

**SOPP Number:** PR7  
**SOPP Title:** “HIP Knowledge Base for Employee Self-Service Support Calls”

**1.0 Version Control**

Version Number	Effective Date	Description of Changes	Approval Date	Approver
1	XX/XX/XX	As issued.	XX/XX/XX	

**2.0 Purpose**

The purpose of this SOPP is to ensure the Hawaii Information Portal (“HIP”) Service Center is appropriately answering employee self-service calls.

**3.0 Scope and Applicability**

This SOPP applies to agents answering HIP employee self-service calls to the HIP Service Center through 201-7378 so that correct and consistent answers are provided to State employees. This SOPP does not apply to questions regarding payroll processing from HIP payroll or human resource users who must use the HIP Ticket Center to receive assistance. This SOPP also does not include security provisioning to HIP which are done via automated by system routines in HIP (i.e., onboarding and offboarding processes).

**4.0 Policy**

All staff members and contractors (“Agents”) who support the HIP Service Center shall use TalkDesk.

## **5.0 Procedure**

HIP Agents are required to follow the Resolution Procedures outlined in the HIP Knowledge Base.

The HIP Knowledge Base is designed to provide uniform and structured responses, and/or procedures for handling and responding to all HIP inquiries from phone calls and voicemail.

Agents will be required to respond to calls and voicemail messages and resolve issues regarding:

- HIP Access to Employee Self Service
- Password resets or expired passwords
- Email security setup
- Pay statements & disbursement information
- Missing paper checks
- Employee profile features
- Direct deposits
- W2/W2c wage & tax statements
- Tax withholding (W4/HW4) forms
- Payroll beneficiary
- Leave request submission
- Timesheet submission
- Leave approvals
- Timesheet approvals
- Leave balance updates
- Timesheet updates
- Resolving browser issues
- Referrals to other offices
- Assisting disabled callers

**ATTACHMENT B,  
Offer Form (OF-1)**

Comptroller  
Department of Accounting and General Services  
State of Hawai'i  
Honolulu, Hawai'i 96813

Dear Sir:

The undersigned has carefully read and understands the terms and conditions specified in the Request for Proposal, Special Provisions, and in the General Conditions, Form AG-008 103D (Rev. 12/17) attached to RFP-HIP-2020-01 as Exhibit 1 and hereby submits the following offer to perform the work specified herein, all in accordance with the true intent and meaning thereof.

The undersigned further understands and agrees that by submitting this offer, 1) he/she is declaring his/her offer is not in violation of Chapter 84, Hawai'i 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: _____	Respectfully submitted,
Telephone No.: _____	_____
Fax No.: _____	_____
Email Address: _____	Exact Legal Name of Offeror

Payment address, if other than street address at right:

_____	_____
	Authorized Signature (Original)
_____	_____
Hawaii General Excise Tax Lic. I.D. No.	Title
_____	_____
Social Security or Federal I.D. No.	Street Address
	City, State, Zip Code

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: \_\_\_\_\_ Hawai'i \_\_\_\_\_ \*Other (Specify Jurisdiction)

\*If "other", is corporate seal available in Hawaii? \_\_\_\_\_Yes \_\_\_\_\_No

**ATTACHMENT C**  
**Offer Form (OF-2)**

**CLIENT REFERENCES**

Offeror shall list below the names and addresses of three (3) companies or government agencies other than the State of Hawaii government to which it has provided or is currently providing services similar to those requested herein. All references must be for work done after January 2017. At least one of the references provided must be for services provided within the State of Hawai'i:

<u>No</u>	<u>Company Name</u>	<u>Address</u>	<u>Contact Person</u>	<u>Email and Telephone Number</u>
<u>1</u>				
<u>2</u>				
<u>3</u>				

EXACT LEGAL NAME OF OFFEROR (COMPANY):

\_\_\_\_\_

AUTHORIZED SIGNATURE: (ORIGINAL):

\_\_\_\_\_

TITLE: \_\_\_\_\_



# ATTACHMENT D

## Offer Form (OF-3)

**State of Hawaii**  
 Price Review for HIP SERVICE CENTER SUPPORT  
 RFP-HIP-2020-01  
 OFFER FORM OF-3  
**PRICE FORM**

Company Name

Primary Point-of-Contact (POC)'s Name

Primary POC's Phone Number, Email Address

(Physical) Business Address

Description	The sum total price submittal for 1 year, inclusive of applicable tax, shown below should be entered into HlePRO for your Unit Price.	
<b>Labor rate per hour/week:</b>	<i>** Note: If cost is included in initial cost, please indicate by typing 'included' in price area</i>	
	Per hour	Per 40 hr week
1 Labor rate - Agent		
2 Labor rate - Supervisor		
Total sum x 52 weeks		

both numbers should match to validate total cost.

EXHIBIT 1

STATE OF HAWAII ATTORNEY GENERAL AG-008 103D GENERAL  
CONDITIONS