



EMPLOYEES' RETIREMENT SYSTEM PROCUREMENT

RFP P20001034 STATE-OF-THE-ART TELEPHONY SYSTEM & AUTOMATED CALL CENTER PRE-OFFER CONFERENCE **MEETING SUMMARY**

Date: Wednesday, May 13, 2020 @ 11:00 – 1:00 HST.

To: Attending Vendors & Consultants.

Called by: S. J. Melendrez, Procurement Specialist.

Location: 12th Floor Conference Room (12A). City Financial Tower, 201 Merchant St, Honolulu, HI 96813.

Subject: **RFP P20001034 PRE-OFFER CONFERENCE.**

Attendees: vCORE, Hi Telecom, Prosis, Servpac, GlobalHost, Microsoft, Audio-Visual Co. & Netmeister Inc.

ERS: Larry Wolfe & Andrea Gasper.

SUMMARY

The pre-offer conference provided an opportunity for live attendance at the meeting to view the environment on Oahu for the systems installation, which is typical also for the neighbor island offices. The meeting was simultaneously presented over TEAMS video conference system, in total there was approximately (59) attendees to the conference live and viewing it online. During the conference there were comments and questions from the attendees in the conference room and online which were shared with the group at large.

1. ABOUT EMPLOYEES' RETIREMENT SYSTEM., (ERS):

It was explained that The ERS is The Employees' Retirement System of the State of Hawaii (ERS) administers a defined benefit retirement plan for the State and county government employees of the State of Hawaii. ERS provides retirement, disability and death benefits for its members. ERS is a qualified defined benefit public pension plan under Section 401(a) of the Internal Revenue Code. Administration of the ERS falls under the policy and executive direction of the Board of Trustees with certain areas of administrative control vested in the state Department of Budget and Finance and in its duties, communication is key for execution of its responsibilities to the State and to its > 135,000 members.

As such The Employees' Retirement System is seeking proposals from qualified Consultant VAR's to review the "As is" Telephone Communications Environment within the Employees Retirement System and provide a "To Be" Design recommendation with total costing involved to create a Unified Communication System (UCS) Scalable Plan tailored for the ERS.

2. THE REASON FOR THE RFP.

It was explained that The ERS's current phone system has been in place for over 30 years and uses analog technology with rotating call center. As such the current system has certain anomalies which is prevalent in this type of legacy system, therefore the ERS is seeking a new Unified Scalable Telephony System for its staff usage and an Automated Call Center to support its members. The existing phone cables/wiring has been installed

3. REP SPECIFICATIONS WALK-THRU INCLUDING THE OFFEROR FORMS.

The specifications walked thru are resident in the solicitation in the RFP and included the pdf document, P20000 SPEC_OFFEROR FORMS which is the legal written narrative/specification for the products and services to be contracted and acquired under this RFP solicitation. And the conference also covered is the Excel document: RFP P20001034 COMPLIANCE RESPONSES PHONE SYS_ CALL CENTER.xlsx, which is for the vendors to annotate the table and check mark yes or no state why their product or service meets or does not meet the specification description. .

4. EXPECTATION OF THE VENDORS IN FULFILING THE RFP REQUIREMENTS.

It was explained the expectation of the vendors who bid on this RFP are to provide a proposal and in their proposal to include the offer forms and the completed excel compliance spreadsheet and the confidentiality agreement signed by a company principal or authorized bidder.

As stated in the specifications, the RFP is open to all qualified vendors. The offeror is to be licensed and authorized by the manufacturer of the products they propose to provide to the ERS. The offeror and their sub-contractors are to be authorized by the manufacturers' to sell, service, support, train, provide warranty work in onsite service physically at ERS offices in Hawaii and will provide online and website support. All offerors are to be registered to be authorized to do business in Hawaii, registered thru DCCA (<https://hbe.ehawaii.gov/BizEx/home.eb>) and to be compliant in Hawaii Compliance Express (<https://vendors.ehawaii.gov/hce/splash/welcome.html>) by the end of bid closing.

5. COMPLIANCE, HAWAII COMPLIANCE EXPRESS: (HCE);

As stated in the specification and described in the conference Offerors to be compliant in Hawaii Compliance Express (<https://vendors.ehawaii.gov/hce/splash/welcome.html>) by the end of bid closing, in order to be considered for award. Hawaii Compliance Express is an automated Tax clearance system which uses the offerors federal and state tax id info and dept of labor info and business registration info to verify the tax and regulatory compliance of the vendor. In order for a vendor to be eligible for an award with the State of Hawaii and the Counties of Hawaii they are required to be complaint in use HCE

6. ESCORTED TOUR OF THE FACILITIES.

The vendors in the onsite pre-offer were afforded the option to take a tour and review office environment in ERS offices for review of placement of the product and support requirements, the offices viewed are typical of neighbor island offices

7. QUESTION AND ANSWER SESSION.

It was expressed and as stated in the specification verbal answers are not binding, only the written narrative in the specification is binding and shall be used for Offeror responses. All questions which vendors may have are to be input to the question section of HIEPRO of the RFP solicitation and will be answered in the same section. Schedule is: Vendors are to input questions by 5/19/2020 at 4 pm HST into HIEPRO, into the solicitation and the answers shall be provided by 5/22/2020 at 4 pm HST in same area of the solicitation.



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AGENDA

1. ABOUT EMPLOYEES' RETIREMENT SYSTEM.
2. THE REASON FOR THE RFP.
3. REP SPECIFICATIONS WALK-THRU INCLUDING THE OFFEROR FORMS.
4. EXPECTATION OF THE VENDORS IN FULFILING THE RFP REQUIREMENTS.
5. COMPLIANCE, HAWAII COMPLIANCE EXPRESS.

6. ESCORTED TOUR OF THE FACILITIES.

7. QUESTION AND ANSWER SESSION (VERBAL ANSWERS ARE NOT BINDING, THE VENDOR ASKING THE QUESTION WILL BE RESPONSIBLE FOR INPUTTING THE QUESTION IN HIEPRO. QUESTIONS ANSWERED BY 5/19/2020, 4 PM HST. AN CONFERENCE SUMMARY ADDENDUM TO BE ISSUED IN HIEPRO FOLLOWING CONFERENCE CLOSING. PRE-OFFER CONFERENCE IS ALSO AVAILABLE VIA TEAMS MEETING AT [Join Microsoft Teams Meeting](#) +1 808-829-4853 United States, Honolulu (Toll) Conference ID: 744 512 014# **Questions, please email SJ Melendrez, at dbf.ers.procure@hawaii.gov, thank you.**



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ATTENDANCE SIGN-IN

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