

PRE-OFFER CONFERENCE
April 14, 2014
8:30 a.m. – 10:00 a.m.

REQUESTS FOR PROPOSALS
RFP No. 13-013-SW

Modernizing The Department of Taxation's
Technology
State of Hawaii Department of Taxation

Agenda

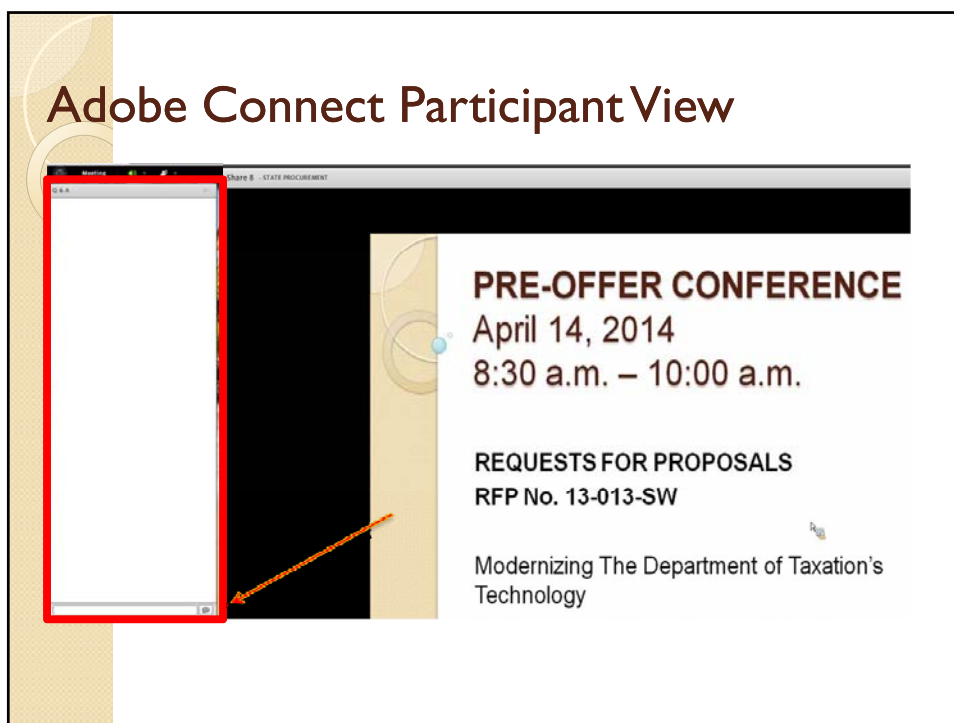
REQUEST FOR PROPOSALS
NO. RFP-13-013-SW
MODERNIZING THE DEPARTMENT OF TAXATION'S TECHNOLOGY

Presenters:

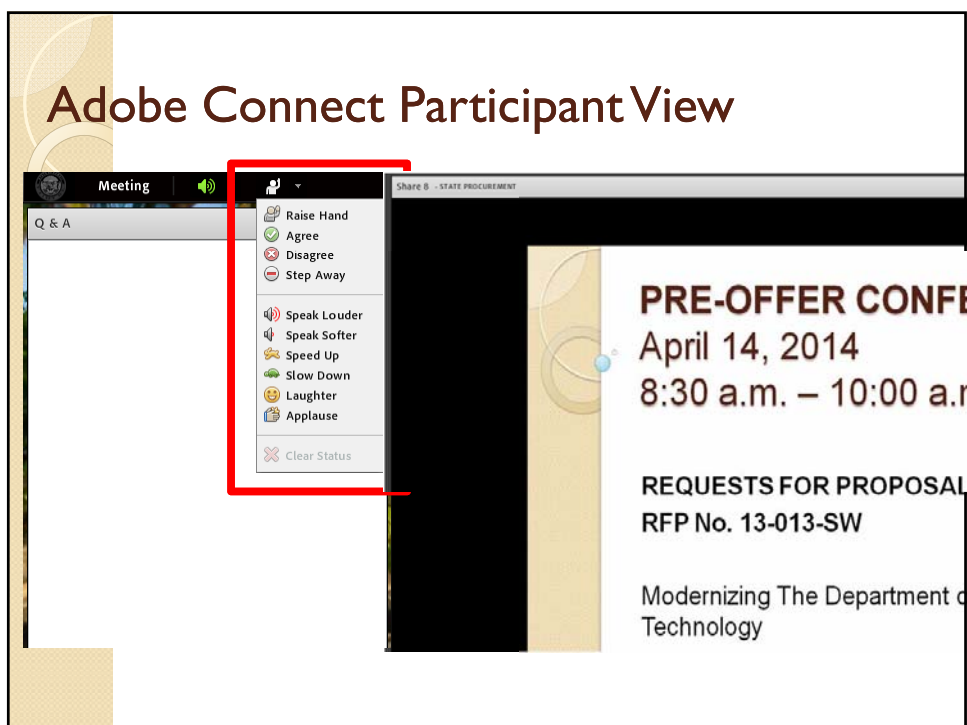
- Kevin Takaesu, State Procurement Office (SPO)
- Stacey Kauleinamoku, State Procurement Office (SPO)
- Joshua Lee, State of Hawaii Department of Taxation (DoTAX)

- * Introduction
- * State Point of Contact
- * Definitions
- * Significant RFP Due Dates
- * Overview of the RFP Process
- * O TSM Objectives
- * Scope of Work
- * Functional Areas
- * RFP Evaluation Criteria
- * Hawaii Electronic Procurement (HlePRO)
- * Hawaii Compliance Express (HCE)

Adobe Connect Participant View



Adobe Connect Participant View



Introduction

- State Procurement Office (SPO) on behalf of the State of Hawaii Department of Taxation (DoTAX).
- RFP issued pursuant to Hawaii Revised Statutes (HRS) Section 103D-303 and Hawaii Administrative Rules (HAR) Title, 3 Subtitle, 11, Chapter 122, Subchapter 6.

State Point of Contact/Procurement Officer

- State POC is Kevin Takaesu, Contact information located in Section 1.10 in the RFP document.
- State Procurement Officer is Mara Smith
- All inquiries/questions shall be submitted through HlePRO.

Definitions

- **Prospective Offeror** – A vendor that has registered in HlePRO
- **Priority-listed Offeror** – Offeror whose proposal is determined acceptable or potentially acceptable.
- **Offeror**- Any individual, partnership, firm, corporation, joint venture or other legal entity, which has submitted an Offer.

SIGNIFICANT RFP DUE DATES	
For a complete listing of the Significant RFP Dues Dates, see Section 1.6 in the main RFP document located in HlePRO.	
Due date/time – Due Date to Submit Questions*	April 25, 2014, 2:00 pm. (HST)
Due date/time - State's Response to Questions*	May 16, 2014, 2:00 pm. (HST)
Deadline for Submission of Offers*	June 12, 2014, 2:00 p.m. (HST)
Discussion with Priority Listed Offerors (if necessary)	To be scheduled as necessary
Best and Final Offer (BAFO)*	To be scheduled as necessary
*Submittal of questions, response to questions and proposals shall be received through the Hawaii State eProcurement System, (HlePRO) by date and time indicated above. Proposals submitted after the deadline and/or not through HlePRO shall not be considered for award.	

Overview of the RFP Process

- Issuance of RFP. All changes to be made through addenda.
- All questions, responses to questions and proposals shall be received on HiePRO.
- Evaluation based on the evaluation criteria set forth in the RFP. Review conducted by committee of at least three government employees.
- If discussions are necessary, a priority-list shall be generated consisting of acceptable or potentially acceptable proposals.
- Addenda shall be issued inviting priority-listed offerors to submit BAFO.
- BAFO shall be scored on criteria set forth in the RFP.
- Award shall be made to the Offeror(s) whose proposal is scored the highest.
- Request for debriefing by non-selected offerors shall be submitted to the Procurement Officer within three (3) working days after posting of award.
- A protest may be filed within five (5) working days after award is made or after completion of debriefing.
- All non-confidential records are available for public inspection after award is made.

TSM Objectives

- Meet high volume and high availability processing and compliance needs
- Simplify and accelerate tax forms, business rule, rate and other tax law changes
- Accommodate shift to electronic filing and payments
- Improve scanning, data capture, document storage, and content management
- Increase utilization of more robust compliance strategies
- Provide the data and processing infrastructure for decision analytics
- Improve core process performance monitoring, management, and reporting
- Reengineer business processes and embrace organizational change management
- Improve application interoperability and data exchange capabilities

Scope of Work

- Solution
 - Hardware / Software Installation
 - Business Rule Configuration
 - Process Mapping
 - Integration
 - Self-Service Functionality
- Services
 - Business Process Reengineering
 - Organizational Change Management
 - Implementation
 - Documentation
 - Data Cleansing & Migration

Core Tax System

- Seamlessly combined integrated tax solution:
 - Physical Mail Processing
 - Document Management
 - Document and Taxpayer Returns Processing
 - Taxpayer Registration and Demographics
 - Correspondence
 - Cashiering
 - Accounting
 - Reporting
 - Case Management
 - Workflow Management

Data Warehouse and Analytics

- Allow the DoTAX to collect data, perform data analytics, and compare data to identify previously unidentified tax delinquencies.
 - Data Warehouse
 - Business Intelligence

Customer Support

- Improve the DoTAX's capability to efficiently educate, service and respond to customer inquiries.
 - Web e-Filing Portal
 - Tax Service Stations
 - Interactive Voice Response (IVR)
 - Customer Relationship Management (CRM)

Evaluation Criteria

Category	Possible Points
<u>Non-Cost Factors</u>	
Functional Requirements	200
Technical Requirements	150
Value Added Services	100
Offeror Qualifications	250
Implementation	100
Total Non-Cost Factors	800
<u>Cost</u>	
(Total cost of ownership during the term of the contract and five (5) years thereafter)	200
Maximum Possible Points	1,000

HlePRO - Pronounced [hi-pro] Where and How to Register

- <http://HlePRO.hawaii.gov>
- Helpful Information
 - Vendor Registration Video
 - Vendor Registration Guide
- Registration is a two step process
 - Create ehawaii.gov account
 - Login and Register as a Vendor
 - You will need your FEIN.
 - Be sure to use the **legal business name** (the award may only be awarded to the Vendor submitting the offer).
 - You must have the authority to submit offers for the business.

HlePRO

The Vendor Commodity Code Profile (NIGP Commodity Code Profile)

- **Primary purpose:** Convenience for vendors
 - Email notifications sent.
 - Vendor will see a list of solicitations on their Vendor Dashboard instead of all solicitations.
- **Not having the commodity code in your profile does NOT prevent a vendor from responding.**
 - Note: Buyer has the ability to add a Vendor when sending out the initial notice; this does **NOT** add the commodity code to your Vendor Profile automatically. Add it if interested.
- **Selecting NIGP Commodity Codes**
 - Type in keywords associated with your Industry.
 - Select commodity code from menu, click Add.
 - Can select all, then scroll down and unselect the codes that do not apply. Can update your commodity code profile at any time.

HlePRO Fees

- Register in HlePRO – no fee
- Submit an offer (proposal) – no fee
- **Transaction Fee to Vendor Awarded –**
 - Fee of .75% (.0075) of the amount award
 - Capped at \$5,000 per award to a Vendor
 - If Award= \$1,000 fee= \$7.50
 - If Award= \$10,000 fee= \$75
 - If Award= \$100,000 fee= \$750
 - If Award= \$1,000,000 fee= \$5,000
- Paid to HlePRO application provider, Hawaii Information Consortium, LLC (Not to the State)

HlePRO Submittal Information

- You may change your response in HlePRO as many times as you like before submittal due date and time.
 - Edit old; Submit new; Verify! (make sure you get a pop-up when you submit; log in again to make sure everything is correct (attachments, etc.) you should also get an email.
- **Offerors shall input the total cost including labor, materials, supplies, all applicable taxes, and any other costs incurred to provide the specified services when submitting their offer in HlePRO.**
- Proposals shall be submitted as attachments on HlePRO.
- Files in PDF format should be compatible with Adobe reader version 9 or greater.
- If your files are large (over 10MB in size), split them into smaller files.
- Include the RFP number and Offeror name in the file name.
- Proprietary information shall be contained in a separate file that is clearly identified as proprietary/confidential.
- On the Offer Form OF-1, ink signatures are not required for electronic submission of offer on HlePRO but shall be required upon Notice of Award.
- Do not wait until the last minute to submit! Once submittal deadline has passed, you will not be able to enter or change anything. The **Submit Offer** button must be pressed to be considered. Make sure your offer is **submitted**, not just saved. Check your Vendor Dashboard.
- If the submittal deadline is 2:00 PM and you are in the process of responding at 2:00 PM but have not **submitted** (pressed the submit button); you will not be able to submit once the deadline has passed.

HlePRO Hints

- Note the instructions for entering pricing in HlePRO are unique to this solicitation. If you respond to other solicitations on HlePRO you will be expected to enter pricing differently.
- If a response or price submitted does not include all the requirements, it is not responsive. If not sure if something is required ask the Buyer. Recommend using the Q&A in HlePRO.
- Need help registering on HlePRO?
 - Call HlePRO Vendor Liaison: Hawaii Information Consortium, LLC at 808-695-4620.
- Questions specific to this solicitation or on policy regarding HlePRO
 - Contact HlePRO Buyer for this solicitation: Kevin Takaesu at 808-586-0568.
- Got general questions about HlePRO?
 - Email: HlePRO@hawaii.gov; or
 - Call 808-586-0554.

Hawaii Compliance Express (HCE)

- HCE is utilized to verify vendor compliance with Hawaii laws to conduct business in the State of Hawaii.
- It is **HIGHLY** recommended to register as soon as possible. Registration is \$12.00 and can easily be completed at <https://vendors.ehawaii.gov>.
- Award(s) will not be made to a non-compliant Offeror.

Additional Information for Vendors

- Copy of today's PowerPoint is available at: <http://spo.hawaii.gov/for-vendors/training/>. Select **RFP No. 13-013-SW Modernizing the Department of Taxation's Technology**. Click on the link in the **Hand Out Column**.
- All questions shall be submitted through HlePRO.

QUESTIONS?

