

DAVID Y. IGE
GOVERNOR



SARAH ALLEN
ADMINISTRATOR

**STATE OF HAWAII
STATE PROCUREMENT OFFICE**

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<http://spo.hawaii.gov>

December 31, 2014

TO: Executive Department/Agencies City & County of Honolulu
Department of Education (DOE) (C&C of Honolulu)
(Excludes Charter Schools) Honolulu City Council
Office of Hawaiian Affairs (OHA) Honolulu Board of Water Supply
University of Hawaii (UH) Honolulu Authority for Rapid Transportation
Hawaii Health Systems Corporation (HART)
(HHSC) County of Hawaii
(Excludes Regional Systems Boards and Hawaii County Council
Hospitals) County of Hawaii-Department of Water Supply
House of Representatives (House) County of Maui
Senate Maui County Council
Judiciary County of Maui-Department of Water Supply
County of Kauai
Kauai County Council
County of Kauai-Department of Water

FROM:

Sarah Allen
Administrator

A handwritten signature in black ink, appearing to read "Sarah Allen".

SUBJECT: **Change No. 2**
SPO Price List Contract No. 13-20
**ADMINISTRATIVE CORRESPONDENCE AND BUSINESS PROCESS
MANAGEMENT SYSTEM - STATEWIDE
RFP-13-009-SW**
Expires: December 16, 2015

The following changes are made to the contract:

- Contract has been extended through December 16, 2015.
- Change OIMT Point of Contact to Christie Ferreira, (808) 586-1920, ext. 307.

The current price list contract incorporating Change No. 2 is available on the SPO website:
<http://hawaii.gov/spo>; click on *Price List and Vendor List Contracts* at the main menu.

If you have any questions, please contact Donn Tsuruda-Kashiwabara at (808) 586-0565 or
donna.tsuruda-kashiwabara@hawaii.gov.

**STATE OF HAWAII
STATE PROCUREMENT OFFICE**

SPO Price List No. 13-20
Includes Change No(s). 2
Revised December 31, 2014

**ADMINISTRATIVE CORRESPONDENCE AND
BUSINESS PROCESS MANAGEMENT SYSTEM
STATEWIDE
RFP-13-009-SW**

December 17, 2012 – December 16, 2015

GENERAL INFORMATION. This price list is for an administrative correspondence and business process management system to be utilized by administrative staff within the State of Hawaii.

The Office of Information Management and Technology (OIMT) is led by the Chief Information Officer (CIO), who reports to the Governor. The CIO is responsible for the oversight of all Information Technology (IT) and Information Resource Management (IRM) assets in the executive branch of the State Government of Hawaii. The CIO is responsible for establishing a Governance, Strategic Plan, Enterprise Architecture and Program/Project Management framework for lifecycle management of all IT/IRM assets. Information regarding the CIO vision and plan is provided at <http://www.hawaii.gov/oimt>.

In accordance with this vision and framework, the CIO and Department of Accounting and General Services (DAGS) have initially implemented this system in the Governor's office by securing a system that manages administrative correspondence, legislative tracking and business process management for the Office of the Governor to be utilized by all administrative staff in the Executive Branch with an interface to the legislative branch as required.

The system is a web-based solution that uses a relational database management system (RDBMS). The system shall have the capability of offering a wide variety of related functions. The necessary functions shall include the ability to:

- log each piece of correspondence quickly and efficiently,
- electronically image (scan) each piece of correspondence and distribute it electronically,
- easily track each piece of correspondence on a day-to-day basis,
- produce a variety of customized correspondence reports, and
- easily locate individual pieces of correspondence and individual constituents through advanced search fields, easily and efficiently produce form letters for printing.

In addition, the system shall have the capability of performing other functions outside of the area of correspondence, including modules for scheduling, workflow, legislative tracking and boards and commissions.

Training to all staff members who will be utilizing the new system will be provided by the Contractor who will also provide technical support system for day-to-day needs.

PARTICIPATING JURISDICTIONS listed below have signed a cooperative purchasing agreement with the SPO and are authorized to utilize this price list contract:

- Executive Departments/Agencies
- Department of Education (DOE) (Excludes Charter Schools)
- University of Hawaii (UH)
- Hawaii Health Systems Corporation (HHSC) (Excludes Regional System Boards and Hospitals)
- Office of Hawaiian Affairs (OHA)
- House of Representatives (House)
- Senate
- Judiciary
- City & County of Honolulu (C&C Honolulu)
- Honolulu City Council
- Honolulu Board of Water Supply
- Honolulu Authority for Rapid Transportation (HART)
- County of Hawaii
- County of Hawaii – Department of Water Supply
- County of Maui
- County of Maui – Department of Water Supply
- County of Kauai
- Kauai County Council
- County of Kauai – Department of Water

The participating jurisdictions are not required but may purchase from this price list contract, and requests for exception from the contract is not required. Participating jurisdictions are allowed to purchase from other contractors; however, HRS chapter 103D and the procurement rules will apply to purchases by using the applicable method of procurement and its procedures, such as small purchases or competitive sealed bidding (CSB). The decision to use this contract or to solicit pricing from other sources will be at the discretion of the agency.

POINT OF CONTACT. Questions regarding services provided through this contract should be directed to the contractor or OIMT, Christie Ferreira, phone: (808) 586-1920, x307.

Procurement questions or concerns may be directed as follows:

Jurisdiction	Name	Phone	FAX	E-mail
Executive	Donn Tsuruda-Kashiwabara	586-0565	586-0570	donna.tsuruda-kashiwabara@hawaii.gov
DOE (Excludes Charter Schools)	Procurement Staff	675-0130	675-0133	doeprocure@notes.k12.hi.us
UH	Matthew Chow Karlee Hisashima	956-2765 956-8687	956-2096 956-2093	chowmatt@hawaii.edu karlee@hawaii.edu
HHSC (Excludes Regional System Boards and Hospitals)	Joe Evanoff	733-4168	733-4460	jevanoff@hhsc.org
OHA	Phyllis Ono-Evangelista	594-1833	594-1865	phylliso@oha.org

Jurisdiction	Name	Phone	FAX	E-mail
House	Brian Takeshita	586-6423	586-6401	takeshita@capitol.hawaii.gov
Senate	Carol Taniguchi	586-6720	586-6719	c.taniguchi@capitol.hawaii.gov
Judiciary	Newton Sakamoto	538-5805	538-5802	newton.t.sakamoto@courts.state.hi.us
C&C of Honolulu	Procurement Specialist	768-5535	768-3299	bfspurchasing@honolulu.gov
Honolulu City Council	Clayton Wong	768-5084	768-5011	cwong@honolulu.gov
Honolulu Board of Water Supply	Vicki Kitajima	748-5151	550-9193	ykitajima@hbws.org
HART	Nicole Chapman	768-6135	768-5110	nchapman@honolulu.gov
County of Hawaii	Jeffrey Dansdill	961-8440	961-8248	jdansdill@co.hawaii.hi.us
County of Hawaii – Dept of Water Supply	Ka’iulani L. Matsumoto	961-8050, ext. 224	961-8657	kmatsumoto@hawaiidws.org
County of Maui	Greg King	249-2403	249-0839 ext. 30	greg.king@co.maui.hi.us
County of Maui- Dept of Water Supply	Kenneth L. Bissen Holly Perdido	270-7684	270-7136	ken.bissen@co.maui.hi.us holly.perdido@co.maui.hi.us
County of Kauai	Florence Kakuda	241-4294	241-6297	fkakuda@kauai.gov
Kauai County Council	Lisa Ishibashi Scott Sato	241-4820 241-4810	241-6349	lishibashi@kauai.gov ssato@kauai.gov
County of Kauai- Dept of Water	Fay Tateishi	245-5423	245-5813	ftateishi@kauaiwater.org

USE OF PRICE & VENDOR LIST CONTRACTS BY NONPROFIT ORGANIZATIONS.

Pursuant to HRS §103D-804, nonprofit organizations with current purchase of service contracts (HRS chapter 103F) have been invited to participate in the SPO price & vendor list contracts.

A listing of these nonprofit organizations is available at the SPO website: <http://hawaii.gov/spo>. Click on “Doing Business with the State” > “SPO Programs Open to Qualifying Non-Profit Organizations.”

If a nonprofit wishes to purchase from an SPO price list contract, the nonprofit must obtain approval from each Contractor, i.e., participation must be mutually agreed upon. A Contractor may choose to deny participation by a nonprofit. Provided, however, if a nonprofit and Contractor mutually agree to this arrangement, it is understood that the nonprofit will retain its right to purchase from other than a SPO price or vendor list Contractor.

VENDOR:

Lockheed Martin Desktop Solutions, Incorporated

IQ Website: <http://www.IntranetQuorum.com/>

Business Address:
2700 Prosperity Avenue
Fairfax, VA 22031

Remittance Address:
2339 Route 70 West; 2nd Floor
AR Department
Cherry Hill, NJ 08022-3315

Contact person: Craig Boerger
Phone: (703) 208-5121
Fax: (703) 206-9889
Email: Craig.Boerger@lmco.com

Secondary Contact: Chris Hart
Phone: (703) 208-5037
Fax: (703) 206-9889
Email: Chris.Hart@lmco.com

VENDOR CODES for annotation on purchase orders are obtainable from the “Alphabetical Vendor Edit Table Report” available at your department’s fiscal office. Agencies are cautioned that the remittance address on an invoice may be different from the address of the vendor code annotated on the purchase order.

UNIT PRICES include all other cost including the State General Excise Tax, currently 4.5% for sales on Oahu, and 4% for sales on the neighbor islands, if applicable.

PURCHASING CARD (pCard). The State of Hawaii Purchasing Card (pCard) is required to be used by the Executive departments/agencies, excluding DOE, OHA, UH and HHSC for orders totaling less than \$2,500. For purchases \$2,500 or more, agencies may use the pCard, subject to its credit limit, or issue a purchase order.

PURCHASE ORDERS may be issued for purchases \$2,500 or more, and for Contractors who either do not accept the pCard, set minimum order requirements before accepting the pCard for payment, or charge its customers a transaction fee for the usage.

SPO PL No. 13-20 shall be typed on purchase orders issued against this price list contract. For pCard purchases, the SPO PL No. shall be notated on the appropriate transaction document.

PROCEDURES TO FOLLOW. The OIMT has signed a **Master Service Level Agreement**, a **Master Software License Agreement** and **Master Software Support Agreement** with Lockheed Martin Desktop Solutions, Incorporated. An agency/jurisdiction interested in obtaining an Administrative Correspondence and Business Process Management System will be required to sign an **Individual Service Level Agreement (Individual SLA)** stating the number of user licenses the agency/jurisdiction will require. The Agency/jurisdiction will be bound by the OIMT Master agreements.

Agency/jurisdiction shall complete and review the template of the Individual SLA and address any issues particular to its agency/jurisdiction, including but not limited to, any

privacy/confidentiality issues and any statutory or regulatory issues affecting the use of the system. No work shall be done under any Individual SLA without prior approval by OIMT.

COMPLIANCE. Prior to awarding a contract, the SPO verified compliance of the Contractor with all laws governing entities doing business in the State pursuant to HRS §103D-310(c), and SPO will monitor compliance throughout the term of the contract via *Hawaii Compliance Express (HCE)*. Therefore, purchasing agencies are not required to verify compliance prior to utilizing a SPO Price or Vendor List Contract. .

VENDOR AND PRODUCT EVALUATION form SPO-012 for the purpose of addressing concerns on this price list contract, is available to agencies at the SPO website: <http://hawaii.gov/spo>. Click on *SPO Forms* on the home page.

PRICE OR VENDOR LIST CONTRACT AVAILABLE ON THE INTERNET at the SPO website: <http://hawaii.gov/spo>. Click on *Price & Vendor List Contracts* on the home page.

GENERAL INFORMATION

SERVICES INCLUDED. The system will be provided in a hosted cloud software-as-a-solution (SaaS) to include the following functions:

- **Citizen Relationship Management** – track vital information required to ensure efficient citizen request fulfillment. Names, unlimited addresses, unlimited communications information (e.g., phones, fax, email address, and website), multiple salutations, notes, and unlimited affiliation cross reference capabilities.
- **Workflow Productivity Tool** – setup templates so unique workflows and procedures can be set up for groups, offices, agencies and departments. Features include notification of assignments, reminders, and various alerts for management.
- **Correspondence** - Data entry to letter creation, from letter generation to letter printing. Effectively manage the incoming mail into government offices daily so staff will be able to efficiently respond to individual letters, form letters, email, faxes, phone calls, and personal visits. Other features include e-newsletter creation, e-survey capabilities and a content management system to administer text, headers, tables, surveys, graphics, etc.
- **Intelligent Mail Routing** – detect subject matter from email and routes messages to the appropriate staff member.
- **Integration with Existing Email System** – interface with the State of Hawaii's IBM's Lotus Notes system.
- **Calendaring** – perform group calendaring and events, and flexible scheduling/notification system.
- **Boards and Commissions** – integrated boards and commissions module; tracks boards, board seats, applicants, board member, etc.
- **Legislative Tracking** – interface with the State of Hawaii Senate and House of Representative's bill tracking database.
- **Security and Privacy** – security and privacy features in compliance with the FISMA and Privacy Act, as well as provide continuous monitoring and protection/risk mitigation against known threats and vulnerabilities.
- **Mobile Interface** – secure role-based access functionality on mobile devices through a web app available on the Apple (iPad, iPhone), Android (tablet/phone) and RIM platforms.

PRICING

SOFTWARE-AS-A-SERVICE (HOSTED) SOLUTION PRICE

Number of Users	Per User License (Year 1)	Per User (Years 2 to 10)
Users – 25 Labor – 25	\$1,605.15 \$153,881.21	\$1,605.15
Users – 50 Labor – 50	\$1,018.58 \$157,704.30	\$1,018.58
Users – 75 Labor – 75	\$841.05 \$159,191.51	\$841.05
Users – 100 Labor – 100	\$752.29 \$162,165.93	\$752.29
Users – 150 Labor – 150	\$609.53 \$167,476.22	\$609.53
Users – 300 Labor – 300	\$466.76 \$184,045.66	\$466.76
<ol style="list-style-type: none"> 1. IQ Cloud Monthly Subscription Software includes IQ Connect, annual IQ eLearning license fee, Annual Software Maintenance, Managed Hosted Virtual Server, and Lockheed Martin Engineering Support to monitor and maintain hosted environment. 2. The Managed Hosted Virtual Server proposal is for six (6) slices of a secured shared environment. 3. Lockheed Martin DSI's price for each out year does not include any labor support. All IQ licenses includes Oracle embedded database. 		

LEGISLATIVE TRACKING SYSTEM PRICE

	Per User License (Year 1)	Per User (Years 2 to 10)
Unlimited Users	\$5,521.76	\$11,256.00
Labor	\$16,550.24	
<ol style="list-style-type: none"> 1. The IQ Legislative Tracking System allows access to an unlimited number of users for the State of Hawaii employee user community. 2. Pricing for each out year does not include any labor support. Travel & Expenses are billed at actual costs or using Federal Travel Guidelines, whichever is the lesser. No travel & expenses shall be incurred by Contractor without the prior approval of the State in writing. 		

ENTERPRISE LICENSE PRICE

	Per User License (Year 1)	Per User (Years 2 to 10)
Unlimited Users	\$900,000.00	\$900,000.00
<ol style="list-style-type: none"> 1. The IQ Cloud Monthly IQ Cloud Monthly Subscription Software includes IQ Connect, annual IQ eLearning license fee, Annual Software Maintenance only. 2. The pricing does not include Managed Hosted Virtual Server, Lockheed Martin DSI Engineering Support to maintain a hosted environment or any other support. 3. Lockheed Martin DSI’s price for each out year does not include any labor support. 4. This IQ product is licensed under Oracle’s Embedded Software License Agreement. Unless otherwise agreed to (prior to award) the product is offered under the terms of the Lockheed Martin Intranet Quorum License Agreement and Maintenance and Support is offered under the terms of the Lockheed Martin DSI Support and Maintenance Agreement. 5. All IQ licenses includes Oracle standard edition embedded database license. 6. Additional Oracle licensing may be required for higher user counts. Specifically, if volume and scope grow, the State may desire to upgrade to enterprise edition Oracle. 7. The pricing is based on a minimum of quantity 10,000 IQ user licenses purchased by the State of Hawaii. 		