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 (HiLePRO)
* Hawaii Compliance Express (HCE)
Adobe Connect Participant View

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Modernizing The Department of Taxation’s Technology
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 HIePRO.
Definitions

- Prospective Offeror – A vendor that has registered in HIePRO
- 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 HIeRPO.

| 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, (HIePRO) by date and time indicated above. Proposals submitted after the deadline and/or not through HIePRO 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 HHePRO.
- 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

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<th>Possible Points</th>
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<td>Non-Cost Factors</td>
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<td>Functional Requirements</td>
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<td>Technical Requirements</td>
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<td>Value Added Services</td>
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<td>Offeror Qualifications</td>
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<td>Implementation</td>
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<td>Total Non-Cost Factors</td>
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<tr>
<td>Cost</td>
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<tr>
<td>(Total cost of ownership</td>
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<td>during the term of the</td>
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<td>contract and five (5)</td>
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<td>years thereafter)</td>
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<tr>
<td>Maximum Possible Points</td>
<td>1,000</td>
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</table>

HlePRO - Pronounced [hi-pro]

Where and How to Register

- [http://HlePRO.hawaii.gov](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 awarded
  - 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?