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**STATE OF HAWAII
STATE PROCUREMENT OFFICE**

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April 02, 2025

TO: Executive Departments/Agencies City and County of Honolulu
Department of Education Honolulu City Council
School Facilities Authority Honolulu Board of Water Supply
Hawaii Health Systems Corporation Honolulu Authority for Rapid Transportation
Office of Hawaiian Affairs County of Hawaii
University of Hawaii Hawaii County Council
Public Charter School Commission County of Hawaii-Department of Water Supply
and Schools County of Maui
House of Representatives Maui County Council
Senate County of Maui-Department of Water Supply
Judiciary County of Kauai
Kauai County Council
County of Kauai – Department of Water County

FROM: Bonnie Kahakui, Administrator *Bonnie A Kahakui*

SUBJECT: **Change No. 2**
SPO Price List Contract No. 24-08
SOURCEWELL UNIFIED COMMUNICATION AND CONTACT CENTER SOLUTIONS
RFP No. 120122
Expires: March 8, 2027

The following changes have been made to the price list contract:

1. Agency Instructions has been updated on page 7.
2. Current Certifications for Mitel Partners (resellers) has been added on pages 11.

The current price list contract incorporating Change No. 2 is available on the SPO website: <http://spo.hawaii.gov>. Click on *Price & Vendor List Contracts* on the home page.

If you have any questions, please contact Alan Yeh at (808) 587-3355 or alan.a.yeh@hawaii.gov.

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**STATE OF HAWAII
STATE PROCUREMENT OFFICE**

**SPO Price List Contract No. 24-08
Change No. 2**
Effective: 04/02/2025

THIS SPO PRICE/VENDOR LIST CONTRACT IS FOR AUTHORIZED BUSINESS ONLY.

**SOURCEWELL
UNIFIED COMMUNICATION AND CONTACT CENTER
SOLUTIONS**

RFP No. 120122
June 28, 2024 to March 8, 2027

INFORMATION ON SOURCEWELL

Sourcewell is a State of Minnesota local government unit and service cooperative created under the laws of the State of Minnesota that facilitates a competitive public solicitation and contract award process for the benefit of its 50,000+ participating entities across the United States and Canada. Cooperative purchasing provides participating entities and suppliers increased administrative efficiencies and the power of combined purchasing volume that result in overall cost savings.

A request for competitive sealed proposals was issued and a contract was awarded to five (5) qualified Contractors. The State of Hawaii has signed a Participating Addendum with one (1) contractor.

For additional information on this contract, visit the Sourcewell website at <https://www.sourcewell-mn.gov/>.

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

| | |
|--|--|
| Executive Departments/Agencies | City and County of Honolulu (C&C Honolulu) |
| Department of Education (DOE) | Honolulu City Council |
| School Facilities Authority (SFA) | Honolulu Board of Water Supply |
| Hawaii Health Systems Corporation (HHSC) | Honolulu Authority for Rapid Transportation (HART) |
| Office of Hawaiian Affairs (OHA) | County of Hawaii |
| University of Hawaii (UH) | Hawaii County Council |
| Public Charter School Commission and Schools | 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 |

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

POINTS OF CONTACT. Questions regarding the products listed, ordering, pricing and status should be directed to the Contractor(s).

Procurement questions or concerns may be directed as follows:

| Jurisdiction | Name | Telephone | Fax | E-mail |
|--|----------------------------|-----------|----------|--|
| Executive | Alan Yeh | 587-3355 | 586-0570 | alan.a.yeh@hawaii.gov |
| DOE | Procurement Staff | 675-0130 | 675-0133 | G-OFS-DOE-Procurement@k12.hi.us |
| SFA | Gaudencia “Cindy” Watarida | 430-5531 | | cindy.watarida@k12.hi.us |
| HHSC | Nancy Delima | 359-0994 | | ndelima@hhsc.org |
| OHA | Christopher Stanley | 594-1833 | 594-1865 | chriss@oha.org |
| UH | Karlee Hisashima | 956-8687 | 956-2093 | karlee@hawaii.edu |
| Public Charter School Commission and Schools | Danny Vasconcellos | 586-3775 | 586-3776 | danny.vasconcellos@spscsc.hawaii.gov |

| Jurisdiction | Name | Telephone | 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 | Tritia Cruz | 538-5805 | 538-5802 | tritia.l.cruz@courts.hawaii.gov |
| C&C of Honolulu | Procurement Specialist | 768-5535 | 768-3299 | bfspurchasing@honolulu.gov |
| Honolulu City Council | Kendall Amazaki, Jr. Nanette Saito | 768-5084 768-5085 | 768-5011 | kamazaki@honolulu.gov nsaito@honolulu.gov |
| Honolulu Board of Water Supply | Procurement Office | 748-5071 | | fn_procurement@hbws.org |
| HART | Dean Matro | 768-6246 | | dean.matro@honolulu.gov |
| County of Hawaii | Diane Nakagawa | 961-8440 | 961-8248 | Diane.Nakagawa@hawaiicounty.gov |
| Hawaii County Council | Diane Nakagawa | 961-8440 | 961-8248 | Diane.Nakagawa@hawaiicounty.gov |
| County of Hawaii-Department of Water Supply | Ka'iulani L. Matsumoto | 961-8050 x224 | 961-8657 | kmatsumoto@hawaiidws.org |
| County of Maui | Jared Masuda | 463-3816 | | jared.masuda@co.maui.hi.us |
| Maui County Council | Marlene Rebugio | 270-7838 | | marlene.rebugio@mauicounty.us |
| County of Maui-Department of Water Supply | Kenneth L. Bissen | 270-7684 | 270-7136 | ken.bissen@co.maui.hi.us |
| County of Kauai | Ernest Barreira | 241-4295 | 241-6349 | ebarreira@kauai.gov |
| Kauai County Council | Codie Tabalba | 241-4193 | 241-6349 | ctabalba@kauai.gov |
| County of Kauai-Department of Water | Christine Erorita | 245-5409 | 245-5813 | cerorita@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 lists contracts.

A listing of these nonprofit organizations is available at the SPO website: <http://spo.hawaii.gov>. Click on *For Vendors > Non-Profits > Cooperative Purchasing Program > View the list of qualifying nonprofits eligible to participate in cooperative purchasing.*

If a nonprofit wishes to purchase from a SPO price or vendor list contract, the nonprofit must obtain approval from each Vendor, i.e., participation must be mutually agreed upon. A Vendor may choose to deny participation by a nonprofit. Provided, however, if a nonprofit and Vendor 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(s).

CONTRACTOR. The following contractor is authorized to provide the following goods and services: unified communications, dedicated instance VoIP PBX, Contact center, collaboration tools, phones and accessories, mass notification, professional services, third-party integrations. They have signed a Master Agreement with the State of Minnesota and a Participating Addendum with the Hawaii State Procurement Office.

| <u>Contractor</u> | <u>Contract (Master Agreement) Number</u> |
|------------------------------|---|
| Mitel Business Systems, Inc. | 120122-MBS |

VENDOR CODES for annotation on purchase orders are obtainable from the *Alphabetical Vendor Edit Table* 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.

COMPLIANCE PURSUANT TO HRS §103D-310(c). Prior to awarding this contract, the SPO verified compliance of the Vendor(s) named in the SPO Price List Contract No. 24-08. *No further compliance verification is required prior to issuing a contract, purchase order, or pCard payment when utilizing this contract.*

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

Note: Vendors may impose a transaction fee, not to exceed 4%, for pCard transactions.

PURCHASE ORDERS (PO) may be issued for purchases \$2,500 or more and for Vendors who either do not accept the pCard or set minimum order requirements before accepting the pCard.

SPO PL CONTRACT NO. 24-08 & SOURCEWELL CONTRACT NUMBER (notated on the vendor information page) shall be typed on purchase orders issued against this price list contract. For pCard purchases, the SPO PL Contract No. 24-08 and the Sourcewell Contract Number shall be notated

on the appropriate transaction document. The Sourcewell Contract Number can be found on the vendor information page.

PAYMENTS are to be made to the Vendor(s) remittance address. HRS §103-10 provides that the State shall have thirty (30) calendar days after receipt of invoice or satisfactory completion of contract to make payment. Payments may also be made via pCard.

COMPLIANCE PURSUANT TO HRS §103-53. All state and county contracting officers or agents shall withhold final payment of a contract until the receipt of tax clearances from the director of taxation and the Internal Revenue Service. This section does not apply to contracts of less than \$25,000.

STATE GENERAL EXCISE TAX (GET) AND COUNTY SURCHARGE shall not exceed the following rates if seller elects to pass on the charges to its customers.

| COUNTY | COUNTY SURCHARGE TAX RATE | STATE GET | MAX PASS-ON TAX RATE | EXPIRATION DATE OF SURCHARGE TAX RATE |
|--|---------------------------|-----------|----------------------|---------------------------------------|
| C&C OF HONOLULU | 0.50% | 4.0% | 4.7120% | 12/31/2030 |
| HAWAII | 0.50% | 4.0% | 4.7120% | 12/31/2030 |
| COUNTY OF MAUI (including Molokai and Lanai) | 0.50% | 4.0% | 4.7120% | 12/31/2030 |
| KAUAI | 0.50% | 4.0% | 4.7120% | 12/31/2030 |

The GET or use tax and county surcharge may be added to the invoice as a separate line item and shall not exceed the current max pass-on tax rate(s) for each island.

County surcharges on state general excise (GE) tax or Use tax may be visibly passed on but is not required. For more information on county surcharges and the max pass-on tax rate, please visit the Department of Taxation’s website at <http://tax.hawaii.gov/geninfo/countysurcharge>.

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://spo.hawaii.gov>. Click on *Forms* on the home page.

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

SCOPE

The contract allows for unified communication and contact center solutions providing comprehensive feature and function complements, including:

- A. Unified communication solutions, such as: VOIP technology, video or audio collaboration and conferencing, mobility options, mass notification, and enhanced messaging;

- B. Contact center solutions, such as: automatic call or contact distribution and routing, omnichannel capability, interactive voice response, real time status, reporting; and
- C. Products and services applicable to the solutions described in A and B above, such as: architecture, implementation, and on-going support for premises-based, cloud-based and hybrid options, hardware, software, technology or social media integration, reporting, and related applications.

Contractors may include related equipment, accessories, and services to the extent that these solutions are complementary to the equipment, products, or service(s) being provided.

AGENCY INSTRUCTIONS

1. Registration on Sourcewell is not required.
2. Agency shall reference the Sourcewell Contract No. 120122-MBS (for Mitel Business Systems, Inc.).
3. Agency shall solicit quotes from Mitel's Authorized Resellers, Maverick Networks, Inc. and/or Pacific Data Systems that meets the agency's needs.
4. For products, freight will be added as a separate line item.
5. For services, complete and execute an Engagement Addendum (EA) and Service Level Agreement (SLA).
6. File the Manufacturer's Suggested Retail Price (MSRP) and Contract Price in the procurement file.
7. Basis of Award. Purchasing Agency may award on best value. Best value means the most advantageous offer determined by evaluating and comparing all relevant criteria, in addition to price, so that the offer meeting the overall combination that best serves the State is selected. These criteria may include, but not limited to, the total cost of ownership, performance history of the vendor, quality of goods, services, or construction, warranties, delivery, and proposed technical performance. The agency shall justify in writing, and document kept in the procurement file, when not selecting the lowest quote.

For ALL Services, an Engagement Addendum (EA) and Service Level Agreement (SLA) is required. The contractor providing the service shall sign. Download the EA & SLA here: https://spo.hawaii.gov/wp-content/uploads/2025/01/Price-List-24-08_EA-and-SLA-v01-15-2025.docx.

Nail Your Business Case

- SOW Must Be Complete – No Gray Areas! Understand the application and what is in scope and out of scope.
- Clarify Ownership of Tasks and Deliverables
- Do not rely on Generic Definitions
- Document Business Value Expectations
- Define Cost to Manage Risk and Quality

SLA

- SLA is a written agreement between both the Purchasing Entity and the Contractor that is subject to the terms and conditions in this Sourcewell Contract and relevant Participating Addendum unless otherwise expressly agreed in writing between the Purchasing Entity and the Contractor. SLAs should include: (1) the technical service level performance promises, (i.e. metrics for performance and intervals for measure), (2) description of service quality, (3) identification of roles and responsibilities, (4) remedies, such as credits, and (5) an explanation of how remedies or credits are calculated and issued

- The Participating Addendum includes SLA as part of the order of precedence. An SLA is required for all services.
- An SLA does not supersede the Participating Addendum and Sourcewell Terms and Conditions.
- The Chief Information Officer (CIO) or CIO's designee needs to evaluate the SLA and review services and security standards before making a determination that the Contractor meets their program objectives and state laws.

SLA cannot be an Afterthought

- Link to organizations SMART Objectives: Specific, Measurable, Actionable, Relevant and Time- Bound.
- Review SLA(s) and Terms and Conditions included in the Sourcewell Contract for service commitments, remedies, and penalties. Ensure SLA(s) align with organizational SMART objective and business needs.
- Closely evaluate all Terms and Conditions for SLA(s) exclusions.
- Consider review process for adjustments to SLA(s) over time.

Recommendations

- Clearly define the scope and objectives. Align with expectations of key stakeholders.
- Transition planning should be a part of your strategy.
- Evaluate the comprehensiveness and achievability of the transition plan.
- Jointly manage the transition plan and escalate issues before they become risks.
- Measure and proactively manage transition processes to achieve success.



MITEL BUSINESS SYSTEMS, INC.
Sourcewell Contract No. 120122-MBS

For price quotes, contact Mitel's Authorized Resellers – Maverick Networks, Inc. and Pacific Data Systems. Payments are made to Mitel's Authorized Resellers.

MITEL INFORMATION

Business Address:

2160 West Broadway, Suite 103
Mesa, AZ 85202

Contact: Murray Van Dyke, Contract Program Manager

Email: murray.vandyke@mitel.com

Phone: (602) 629-8811

Website: <https://www.mitel.com/>

Mitel Pricing Discounts:

Contact Center & UC Applications – 38% off list price

Core Telephony Infrastructure – 33% off list price

Devices – 35% off list price

Peripherals & Legacy – 35% off list price

Software Assurance (SWA) – 15% off list price

Services - 0% off list price

Third Party - 0% off list price

Nil Discount - 0% off list price

Partner Built/ Partner Delivered (Powered by Mitel) solutions – 20% off list price

AUTHORIZED RESELLER

Maverick Networks, Inc.

Business Address:

1849 Iron Point Rd Ste 100
Folsom, CA 95630

Remittance Address:

Same as Business Address

Contact: Aaron J. Lee

Email: AJLee@mavericknetworks.net

Phone: (925) 931-1900

Fax: (916) 365-8088

AUTHORIZED RESELLER

Pacific Data Systems

Business Address:

95-1146 Anuanu St.
Mililani, HI 96789

Remittance Address:

121 Robot St. Ste 101
Maite, GU 96910

Contact: Ralph Bautista

Email: ralph@pdshawaii.com

Phone: (808) 948-9687

Current Certifications for Mitel Partners listed as Resellers for SPO PL 24-08:

Subject to and in accordance with the terms of the Mitel Partner Program Agreement, the Mitel Partner must obtain certification from Mitel for the specific Mitel Products/Applications that they offer for sale.

Maverick Networks, Inc.

| Product Category | Product Sub-Category | Active Certs (Number of People) |
|----------------------------------|-----------------------------|--|
| MiContact Center Business | MiCC Sales | 3 |
| MiVoice Business | MiVB Platform | 10 |
| MiVoice Business | MiVB Solution (UCC) | 5 |
| MiVoice Business | MiVB Sales | 3 |
| MiVoice Business (CC) | MiVB Solution (CC) | 5 |
| MiVoice Connect | MiVC Platform | 1 |
| MiVoice Connect | MiVC Solution (UCC) | 1 |
| MiVoice MX-ONE | MiVMX-ONE Platform | 1 |
| MiVoice MX-ONE | MiVMX-ONE Solution (UCC) | 1 |
| MiVoice MX-ONE (CC) | MiVMX-ONE Solution (CC) | 1 |
| MiVoice Office 250 | MiVO 250 Platform | 8 |
| MiVoice Office 250 | MiVO 250 Solution (UCC) | 2 |
| MiVoice Office 250 (CC) | MiVO 250 Solution (CC) | 3 |

Pacific Data Systems, Inc.

| Product Category | Product Sub-Category | Active Certs (Number of People) |
|-----------------------------|-----------------------------|--|
| MiVoice Business | MiVB Platform | 1 |
| MiVoice Connect | MiVC Platform | 1 |
| MiVoice Connect | MiVC Solution (UCC) | 1 |
| MiVoice Connect (CC) | MiVC Solution (CC) | 1 |