STATE OF HAWAII
560 North Nimitz Highway
Honolulu, Hawai'i 96817

March 6, 2018

REQUEST FOR INFORMATION

RFI No PU 2018-28
CONTRACT MANAGEMENT SOFTWARE SYSTEM

I. BACKGROUND

The Office of Hawaiian Affairs (hereinafter "OHA") was created under the constitution of the State of Hawai'i and administers a public trust devoted to the betterment of conditions of Native Hawaiians pursuant to HRS Chapter 10. The OHA conducts all solicitations in accordance to the Hawai'i Revised Statutes and the Hawai'i Administrative Rules, as amended. The OHA Procurement Unit conducts all solicitations for the OHA.

II. OVERVIEW

The OHA is preparing a Request For Proposal (hereinafter "RFP") for services providing a contract management software system (hereinafter "SYSTEM"). The OHA is interested in your feedback regarding a planned RFP.

Specifically, this Request for Information (hereinafter "RFI") is to understand types of SYSTEMs available in the current market. The SYSTEM shall include, but not limited to the ability to: process compliantly all elements of contract request, development, approvals and tracking. The SYSTEM must house historical, current contracts, purchase orders, invoices and check issuances; send email notifications with a link to view and editing to smartphones, tablets and desktops, auto assign purchase requests, contract approvals; workflow based on internal logic; automatically send follow up emails for record updating, provide manager to employee linking for e-messaging for status updates; ability to customize and the associated costs; and include built-in reporting and customized reporting tools. The SYSTEM must provide document security and allow for version control of original contracts vs amendments. The OHA request at a minimum information regarding: the length to implement; approximated cost to maintain per year; kind of expertise needed to maintain the SYSTEM, ability to change, expand and/or update the SYSTEM in-house or if it requires you to do complete changes, expansions, or updates, it and any associated costs.

The intent is to procure a contract management software system that will ensure that any OHA staff with appropriate access can easily find and view critical contract data, research historical contract record data, produce individual and summary reports and provide alerts for end of the contract terms.

Please review the information contained within this RFI and provide a response or comment to the anticipated services to manage the contracts for the OHA.

Please provide your response in pdf format, by 3:00 p.m. Hawai'i Standard Time, Friday March 23, 2018, by emailing phylliso@oha.org or by mail to the point of contact below.

If you are interested in responding to this solicitation you may download the RFI from the OHA website: www.oha.org/solicitations; the SPO website: https://hiepro.ehawaii.gov/welcome.html; The point of contact below is:

For Questions Contact:
      Phyllis Ono-Evangelista   Email: phylliso@oha.org
      Procurement Manager   Phone: (808)594-1833
      Office of Hawaiian Affairs

III.   SPECIFICATIONS

The OHA is seeking a SYSTEM that gathers contract information and automatically generates the required documentation and related forms electronically to allow for contract modifications which are routed for review and approval. The final documents with all necessary signatures are then scanned and stored in a cloud-based storage.

1. The-OHA is seeking a SYSTEM that assists in organizing, accessing and executing contracts and related documents, from beginning of request through complete closure of contract, while housing these documents in a secured system.

   The OHA is interested in a SYSTEM that shall include, but not limited to the capabilities as described below:

   A. The SYSTEM must be user friendly, the OHA staff, contractors and vendors will have a variety of skill levels and security levels.

   B. The SYSTEM should have an interface that would allow OHA to view, manage and customize views that will allow us to manage the entire contract lifecycle.

   C. The SYSTEM should allow for the administrator to manage user security by role for viewing, editing and deletion of any document.

   D. The SYSTEM should have a robust reporting capability. This would include the ability for the Administrator to create and save custom reports, in various formats. The SYSTEM should also allow for ad-hoc reporting.

1) Serve as the start of the request for purchase of goods and services, and health and human services with the ability to reject;

2) Provide originator review, approval and revision status for all aspects necessary;

3) Provide capabilities to search and locate stored contracts and all related documents;

4) The SYSTEM should have audit and security capabilities to comply with internal and external audit requests; and

5) For Purchase Order revisions, must be able to keep track of changes to include but not limited to (1) cumulative/revised balances, and (2) account changes; and

6) Provide alerts for various contract and related documents timelines throughout the time of performance.

E. Document workflow for contract execution shall include, but not limited to the ability to design a workflow process starting with a purchase request and ending an executed contract and review, revisions and approval by both internal and external users.

1) Automatically store purchase orders, its revisions, non-purchase order request, sponsorships and grants.

2) Implementation process shall include the exporting and importing of contract and other documents from an existing system, including a schedule respondent's resources it would require to successfully complete the implementation.

3) Address how documents will be stored, backed up and secured historically. Recommendations on to how to support the SYSTEM within the OHA network of the use cloud hosting.

4) Address how templates can be built, stored and used to provide consistency and efficiency in development of contracts.

5) Address software support and maintenance services available, including the number of planned project upgrades during the next twenty-four (24) months.

F. The SYSTEM shall be able to integrate with existing systems including SharePoint and Oracle.

1) Integration may shall include linking to other OHA systems or at least the ability to import and export .csv files.

2) The SYSTEM must be able to use data from existing systems and incorporated it into user-defined document templates that can be sent to designated recipients for electronic signatures.

3) The SYSTEM shall allow the user to select between multiple templates.

IV.   COST PRICING

1. The price submittal shall be separate for the primary contract management system (Core price) and secondary pricing shall be separated for any optional capabilities (modules or add-in price).

2. Under implementation services provide the cost for data extractions and uploading into your system from the Microsoft SharePoint and PDF contract files stored in Microsoft. The current contract storage has been active since 2006 and has more than 300 contract records which include attached PDF files.

V.   PRODUCT DEMONSTRATIONS

The OHA may request product demonstration based on the proposals received, therefor not all respondents may be invited to provide a demonstration. Demonstration shall be online and allow for multiple users to view the presentation. Demonstration of live systems, designed to meet governmental regulations and requirements.

VI.   RESPONSE

1. The OHA is requesting a response that would best fits the OHA's requirements as described in this RFI. The response is requesting both technical and non-technical information that the OHA would use in understanding different types of contract management software systems available in the market place, and the requirements for implementing such a system. Address minimum and optional capabilities as described in Section IV above.

   A. Address ability to audit work within the system;

   B. Address storage, backup and retrieval;

   C. Address software support and maintenance services available, including the number of planned project upgrades during the next twenty-four months;

   D. Include your firm's contact information, along with example of three most recent completed installations; and

   E. Include ideas or best practices that would contribute to the success of this project.

2. The OHA is requesting budgetary pricing for a contract management software system in accordance with Section IV above. The pricing should be separate for the primary contract management system (**See** Section IV), along with any optional capabilities prices separately. While the OHA understands your pricing may not be broken down as requested above, but submit a pricing as closely as possible in accordance with this section.

3. Implementation services shall include data extractions from the OHA's current systems and have the capability to upload into a new system. List the estimated costs based on a typical project for the number of contracts and the various methods in which the contracts are saved.

4. Please provide your response in pdf format, by 3:00 p.m. Hawai'i Standard Time, Friday, March 23, 2018, by emailing phylliso@oha.org or by mail to the point of contact below.

   If you are interested in responding to this solicitation you may download the RFI from the OHA website: www.oha.org/solicitations; the SPO website: https://hiepro.ehawaii.gov/welcome.html; The point of contact below is:

   For Questions Contact:
   Phyllis Ono-Evangelista   Email: phylliso@oha.org
   Procurement Manager   Phone: (808)594-1833
   Office of Hawaiian Affairs

VII.   QUESTIONS

The OHA requests all question be submitted via email, no later than Friday, March 23, 2018. Responses to all questions will be distributed to all who are interested. The OHA reserves the right to reject or deny any requests(s) made by potential respondents. Impromptu, oral question are permitted, but are only intended as general direction and will not represent and official OHA position.

VIII.   USE OF INFORMATION

1. The OHA, at its sole discretion, may or may not issue a related solicitation or issue multiple solicitation based on the response to this RFI. Responses to this RFI is not a condition for eligibility to respond to any subsequent solicitation. Responses to RFI will not have any bearing, positive or negative on the evaluation and vendor selection resulting from any proposals that may be received in response to a subsequent solicitation.

2. The OHA is subject to Hawai'i's Open Records Law (HRS 92F) which imposes strict accountability and reporting requirements. Any response or other information submitted by a respondent to the OHA may be subject to disclosures by the OHA as required by law. Respondents can research the State of Hawai'i's Office of Information Practice decision for more information on the subject.

3. All material and information provided to the OHA is response to this RFI shall upon receipt become the property of the OHA and shall not be returned.

4. By submitting a response, the respondent agrees that the OHA may copy the response for purposes of facilitating the OHA's review or use of the information. The OHA will have the right to use ideas or adaptions of ideas that are presented in the response for the

specific future use of procuring a contract management system. The respondent also acknowledges that such copying will not violate any copyrights, licenses, or other agreements with respect to the materials submitted in accordance with the OHA's intended use.

5. The OHA is not responsible for any costs incurred by the respondent that are related to the preparation or deliver of the response or any other activities of the respondent related to this RFI.

IX.   PRODUCT DEMONSTRATIONS

The OHA may request product demonstrations based on the information received; therefore not all respondent may be invited to provide a demonstration. Demonstration shall be online and allow for multiple users to view the presentation.

END OF SOLICIATION