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

March 16, 2018

**REQUEST FOR INFORMATION**

**RFI No PU 2018-28**
**CONTRACT MANAGEMENT SOFTWARE SYSTEM**

**Addendum No. 1**

**Q 1**: How many people work for OHA and are they all eligible to buy goods and or services for their jobs?

A: *There approximately 170 staff employed with the OHA, majority are able to submit request for purchase which require preapproval by the management.*

**Q 2:** How many total Invoices does OHA process on an annual basis?

A: *The estimated amount of invoices are 7,500 annually.*

**Q 3:** What is the annual spend of OHA? How much does your office pay annually?

A: *The estimated amount of expenditure is approximately $42 million*

**Q 4:** Does OHA have an automated Expenses Management solution?

A: *Yes, currently the OHA accounting system is Oracle.*

**Q 5:** Does your office ever "Source" products and or Services? If yes what is the "Sourcing process"

A: *Yes, if referring to contracting services. The OHA is a state agency and must comply with the State of Hawaii Statutes and Rules for public procurement. As such the OHA conducts solicitations which are published on two site the OHA website and the State Procurement Office website.*

**Q 6:** How many Invoices are received that do not have a matching PO?

A: *The estimated number of check request for invoices are $4,000*

**Q 7:** Please confirm whether OHA would prefer Train-the Trainer model for Training or end-user training? Also specify the number of users to be trained?

A: *Both methods of training will be considered. Approximately 150 staff will require training, however not all staff will have the same level of access. Levels of use would*

*include accessing all contract management versus only viewing, and only for monitoring purposes. Should there be a module for Accounts receivables only a limited number 12 will have varied layers of access.*

**Q 9:** What is the preferred deployment scenario ( Cloud or on-premise) for proposed workflow solution?

*A:* *Ideally, Cloud based if certified for sensitive data.*

**Q 10:** For on-premise does the vendor needs to supply hardware or only specifications needs to be provided?

*A:* *Either can be provided, however a cost associated would be helpful.*

**Q 11:** For on-premise, please share total number of users that will access the system?
*A:* *Up to 180 OHA staff.*

**Q 12:** Please share the approximate number of full users (frequent users) and partial users (who will use system for approximate 10/20 hrs in a month) that we need to consider for providing pricing for cloud option?

*A:* *For the contract management system there will be 10 staff which will be full time users will be access as a part of their daily work, and other 100 frequent users and the 70 partial users*

**Q 13:** Please share number of years of support that we need to consider for pricing?
A: We are anticipating the support may included in a licensing agreement.

**Q 14**: Are you looking for **just** Contract Management? Or are you open to other options that include Contract Management? (I know your Software Advice inquiry included Procurement).

*A:* *Yes, we are open to other modules within your system, that we may plan on for future purchases the intent is to have some modules which can work together or one system to address the OHA's purchasing, contract management and accounting needs.*

**Q 15**: How are you currently handling those processes today?
*A:* *Currently all the systems are separate: initial purchase request, contracting (manual), management of contract by excel sheets, and separate system for accounting.*

**Q 16**. What is driving this initiative? Is there a pain that you are specifically looking to change?
*A:* *The current systems require repetitive efforts to track a purchase from inception to the close of a contract and/or purchase. Manual excel spread sheets time consuming and difficulty to maintain.*
*The OHA is committed to increasing reporting capabilities, efficiency and accountability.*

**Q 17**. What is your timeline?
*A:* *Based on the information received through this Request for Information (RFI), we are anticipating releasing a Request for Proposal by early April 2018, contacting by late June and operational by end of 2018.*

**Q 18:**  Where will questions be posted?

*A:*  *The questions and responses will be posted to the OHA and SPO websites.*
*OHA:*  *https://www.oha.org/solicitations  and*
*SPO:*  *https://hands.ehawaii.gov/hands/opportunities*

**Q 19:**  Could the question period be revised to have a closing date of 5pm HST Wednesday, March 21$^{st}$ so that any late submitted questions don't cause major changes to proposal responses?

**A:**   No, for this Request For Information (RFI) the time will remain the same.

**Q 20**  On Page 1 of the RFI, Section II. OVERVIEW, second paragraph, it is stated that the SYSTEM must "Provide manager to employee linking for e-messaging for status updates".

As "e-messaging" has a broad definition, please clarify what is meant by "linking for e-messaging" in the context of OHA's business requirements (e.g., very set requirements?) and/or whether the Respondent has the flexibility to share its best practice e-messaging options.

A:  Instant messaging capability or similar.

**Q 21:**   On Page 5 of the RFI, Section VII. USE OF INFORMATION, Item 4, it is stated that "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."

Please confirm whether OHA is willing to sign an NDA, prior to RFI submission, which limits such copying, review, use and sharing to "need-to-know employees or Third.

*A:*  *No, the OHA will not sign a NDA, for this RFI.*

**Q 22**  Whether companies from Outside Switzerland can apply for this?
(like, from India or Canada)

*A:*  *Yes, companies from outside Switzerland, India, Canada, etc. may submit their information in response to this Request For Information. Please note this is not a Request for Proposal and the OHA is currently seeking information what is currently available in the market for contract management systems.*

**Q 23:**  Whether we need to come over there for meetings?

*A:*  *Yes, it is anticipated when the services are contracted onsite training will be necessary.*

**Q 24** Can we perform the tasks (related to RFP) outside Switzerland?
(like, from India or Canada)

**Q 26:** Can we submit the proposals via email?

*A:* *Yes, you can submit your response to this RFI by email:*

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](mailto:phylliso@oha.org) or by mail to the point of contact below.

Please contact RFI Coordinator Phyllis Ono-Evangelista, at (808) 594-1833 or email [phylliso@oha.org](mailto:phylliso@oha.org) for any questions.