



ADDENDUM # 2, RECORD OF TEAMS VIRTUAL PRE-OFFER
 CONFERENCE OF 03/18/2021. MEETING WAS SUCCESSFUL
 AND PROCEEDED ON SCHEDULE
 BELOW AGENDA ITEMS WERE COVERED.



**EMPLOYEES' RETIREMENT SYSTEM
 PROCUREMENT MANAGEMENT SECTION**

PRE-OFFER MEETING for (RFP)

ERSP-105, ACTUARIAL SERVICES, TERM 2021 – 2026

Date/Time: March 18, 2021 / 0830 am HST
Location: 14th Floor Conference Room, TEAMS Accessible
Subject: Actuarial Services Pre-Offer Conference
Called by: SJ Melendrez, Procurement Specialist
Called for: Qualified Interested Offeror's.

This is an ERS Procurement **Pre-Conference meeting** for Qualified Offeror's for ERS Request for Proposal (RFP) # ERSP-105, for Actuarial Services for the 2021-2026 Term. Interested Offeror's are to email to dbf.ers.procure@hawaii.gov and copy Steven.Melendrez@hawaii.gov and Larry.Wolfe@hawaii.gov, their interest in the pre-offer conference and provide their firm's contact information to be added to the vendor listing.

AGENDA

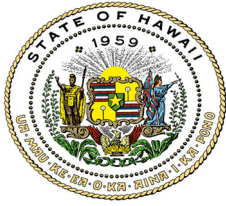
1. **Procurement - Melendrez:**
 - a. Welcome and Introductions
 - b. RFP Formal Notification review.
 - c. Schedule
 - d. Compliance.
2. **ERS Principals**
 - a. Topics and Open Discussion
3. **Offeror's**
 - a. Questions, interests, issues.
4. **Procurement - Melendrez:**
 - a. Thank you and meeting wrap-up.

ATTENDEES

Attendees to the Pre-Offer Conference included the following firms:

- Cheiron Inc.
- GRS Consulting.
- Milliman.
- Segal Company.

(Please note all answers to questions verbally provided at pre-offer conference are not binding. Offeror's are encouraged to email their questions to dbf.ers.procure@hawaii.gov with copies to Steven.Melendrez@hawaii.gov and Larry.Wolfe@hawaii.gov. Answers to the questions will be provided via an addendum to the solicitation in State of Hawaii websites <https://ers.ehawaii.gov/> and <https://hands.ehawaii.gov/hands> per the procurement time table in RFP specification page 5).



NOTICE TO OFFEROR'S
REQUEST FOR PROPOSALS,
(RFP) # ERSP-105, for
ACTUARIAL SERVICES, TERM 2021 – 2026
for the EMPLOYEES' RETIREMENT SYSTEM
of the STATE OF HAWAII.

Summary:

The Employees' Retirement System of the State of Hawaii (ERS) is soliciting proposals from qualified firms to provide actuarial services. ERS will be providing a single, multi-year award to one (1) firm. In order for the Offeror firm to be considered for award, the Offeror is required to be in business for a minimum of five (5) years. Have three (3) statewide, multi-employer public pension fund clients which has assets totaling \$10 billion with a membership greater than 100,000 members.

Posting:

The RFP solicitation is posted at State ERS website (<https://ers.ehawaii.gov/>) and at State SPO website (<https://hands.ehawaii.gov/hands>). Offeror's are to carefully examine the specifications thereof and proceed accordingly in order to be considered for award.

Compliance:

In order for an Offeror firm to be considered for award it is to be **duly registered** to do business in the State of Hawaii, registered through (<http://cca.hawaii.gov/resources>) **and to be Compliant** in Hawaii Compliance Express (HCE) (<http://vendors.ehawaii.gov/hce>) by the date and time of award.

A compliant vendor will be issued a Compliance Certificate by HCE which the State requires a vendor to have and be maintained through-out the contract term in order to receive award and subsequent payments for services. Offeror's are requested to register in advance at the above agencies in order to allow for ample time for compliance processing.

Due Date:

Hardcopy Proposals are to be shipped and **received at ERS by April 12, 2021 at 4:00**, delivered to:

Employees' Retirement System of the State of Hawai'i
201 Merchant Street, Suite 1400, Honolulu, Hawaii 96813

Inquiries:

Please email inquiries to dbf.ers.procure@hawaii.gov with a copy to Steven.Melendrez@hawaii.gov and Larry.Wolfe@hawaii.gov

1.5 PROCUREMENT TIMETABLE:

Offerors are notified the dates below are estimated by the State for this project and are subject to change at the State’s discretion (all times are Hawaii Standard Time (HST)). Schedule revisions will be issued via an addendum to this RFP and posted in ERS website, (<https://ers.ehawaii.gov>) and State website, Hawaii Awards & Notices Data System, (HANDS), (<https://hands.ehawaii.gov/hands/>).

<u>Activity</u>	<u>Scheduled Date</u>
RFP Release	March 11, 2021
Pre-Bid Offeror Virtual Conference (TEAMS)*	March 18, 2021
Offeror questions due via email *	March 23, 2021
ERS response to vendor questions*	March 29, 2021
Solicitation Closing, Proposals & Offers Received by**:	April 12, 2021 by 4:00
Proposal judging	April 12 – April 18, 2021
Discussion/presentations of priority offerors	April 19 – April 22, 2021
Best and final offers due, ***.	April 29, 2021 by 4:00
Notice of Award.	June 01, 2021
Contract start date	July 01, 2021
Contract end date	June 30, 2026

Priority listed offerors selected in accordance with Section 4 of this RFP may be asked to make a virtual presentation via TEAMS per Procurement Timetable and to provide question and answer session(s). Selected priority listed offerors will be contacted by ERS Procurement via email to schedule a specific time for the presentation and Question & Answer sessions.

ERS Procurement may exercise the Best and Final (B&F) option to make final determination of an Awardee of the RFP. But offerors are advised that their first offer may be considered their “Best and Final” due to a Best and Final option may not be exercised by the State.

If an Offeror is asked to provide a Best and Final Offer concerning this RFP, Offeror is to provide their Best and Final Offer per Section 1.9

*: See Section 1.6 for information on Pre-Bid Conference and Offeror’s questions.

** : See Section 1.7 for information on Submission of Proposals

***: See Section 1.9 for information on Best and Final Offers.

**PRE-CONFERENCE MEETING
ACTUARIAL SERVICES
COMPLIANCE**

1.18 REQUIREMENTS FOR DOING BUSINESS WITH THE STATE OF HAWAII

Section 3-122-112, Hawaii Administrative Rules (HAR), requires that, **before award of contract** may be made, the successful offeror must provide proof of compliance with the requirements of the following chapters of the Hawaii Revised Statutes (HRS), via Hawaii Compliance Express (HCE), (<https://vendors.ehawaii.gov/hce>).

- 1) Chapter 237, general excise taxes
- 2) Chapter 383, unemployment insurance
- 3) Chapter 386, workers' compensation
- 4) Chapter 392, temporary disability insurance
- 5) Chapter 393, prepaid health care

The Offeror's are to be duly registered to do business in the State of Hawaii, registered through <https://cca.hawaii.gov/resources> and to be Compliant in Hawaii Compliance Express (HCE) <https://vendors.ehawaii.gov/hce/buyer/search.html>, by the date and time of award.

Proof of compliance with the foregoing requirements can be provided through the Hawaii Compliance Express (HCE), (<https://vendors.ehawaii.gov/hce>). HCE provides online instructions of the HCE process. **In order for the State to issue an award a company is required to have an HCE Compliant certification, (see attached).** The contractor must maintain such compliance during the term of the contract and for final payment.



EXAMPLE

**STATE OF HAWAII
STATE PROCUREMENT OFFICE**

CERTIFICATE OF VENDOR COMPLIANCE

This document presents the compliance status of the vendor identified below on the issue date with respect to certificates required from the Hawaii Department of Taxation (DOTAX), the Internal Revenue Service, the Hawaii Department of Labor and Industrial Relations (DLIR), and the Hawaii Department of Commerce and Consumer

Vendor Name: **VENDOR NAME EXAMPLE**

DBA/Trade Name: **DBA EXAMPLE**

Issue Date: **03/17/2021**

Status: **Compliant**

Hawaii Tax#: XXX-XXX-XXXX-04
New Hawaii Tax#: XXX-XXX-XXXX-04
FEIN/SSN#: XX-XXXXXXX
UI#: XXX-XXX-XXXX-04
DCCA FILE#: XXXXXXXXXXX XXXXXX

Status of Compliance for this Vendor on issue date:

Form	Department(s)	Status
A-6	Hawaii Department of Taxation	Compliant
	Internal Revenue Service	Compliant
COGS	Hawaii Department of Commerce & Consumer Affairs	Compliant
LIR27	Hawaii Department of Labor & Industrial Relations	Compliant

Status Legend:

Status	Description
Exempt	The entity is exempt from this requirement
Compliant	The entity is compliant with this requirement or the entity is in agreement with agency and actively working towards compliance
Pending	The entity is compliant with DLIR requirement
Submitted	The entity has applied for the certificate but it is awaiting approval
Not Compliant	The entity is not in compliance with the requirement and should contact the issuing agency for more information