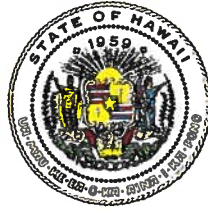


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**STATE OF HAWAII  
EMPLOYEES' RETIREMENT SYSTEM**

February 20, 2025

Addendum No. 2  
To  
Request for Proposal for  
V3locity Migration Project Manager  
RFP 2025-02:

The Employees' Retirement System of the State of Hawaii (ERS) is providing the following responses to questions re: Request for Proposal for V3locity Migration Project Manager RFP 2025-02:

1. **Question:** Can ERS please confirm that Vitech has already been chosen as the 3<sup>rd</sup> party system implementor/integrator for this project and if and when they started working with the State on this project?

**Response:** Vitech will be the chosen PAS vendor. We do not have a clear date for migration, however, we expect the project to start sometime in 2025.

2. **Question:** The RFP states that: "Under ERS supervision, Awardee will support the ERS internal team to migrate its existing Vitech's pension administration system from V3 (Version 10) to V3locity."

Can ERS please explain the structure and composition of its internal team and the Vitech team, including project position titles (that intuitively convey their responsibilities on the project) and FTE they have been allocated to the project? This will help us in understanding the level of effort that will be needed to help augments/support the existing ERS and Vitech project teams.

**Response:** ERS does not have a definite structure for its migration team at the moment. There is a Project Lead, a Project Manager Lead, and a team ranging from between 5-20 at any given moment addressing migration activities. The Velcoity Team will be made up of its project lead/manager that will work with a "team" that will work with the ERS to migrate its PAS.



Employees' Retirement System  
of the State of Hawaii

3. **Question:** The RFP states that: "Funds are not presently available for performance under the Contract beyond the current fiscal year. Offeror to provide a detailed description of their proposed costs in their response per section 3.10 Proposed Fees. The ERS's obligation for performance of the Contract beyond the fiscal year is contingent upon the availability of funds from which payment for contract purposes can be made. No legal liability on the part of the ERS for any payment may arise for performance under the Contract beyond the current fiscal year until funds are made available for performance of the Contract."

Does ERS mean that this contract will potentially end this fiscal year on June 30, 2025 or is the State referring to the next fiscal year, in which case the contract will potentially end on June 30, 2026 (if no funding is identified/provided to continue to fund these services)? Or does ERS operate on a different fiscal year than July 1 through June 30?

**Response:** This is standard legal requirements/language required for any State of Hawaii multi-year procurements (i.e. contracts). Yes ERS' the fiscal year is from July 1 to June 30.

Please refer to answer provided to question #17.

4. **Question:** The RFP states that: "Awardee will perform an independent assessment of the currently implemented Vitech V3 application to identify business processes and workflows to determine their transferability to V3locity to include in written reports but not limited to the following..."  
Can ERS please confirm that V3locity has already been chosen as the new system for this project?

**Response:** We are reconfirming that Velocity is the selected vendor.

5. **Question:** Can ERS please briefly describe its vision for the division of effort on data profiling and data conditioning/remediation (i.e., how much of this work does ERS expect the awarded vendor to conduct versus ERS/State staff) or is the awarded vendor just expected to manage/direct/oversee this work?

Can ERS please briefly describe the quantity and quality (i.e., how clean/accurate/comprehensive) of the data involved and where it is currently housed?

**Response:** The requirement is to perform an independent assessment of the currently implemented Vitech V3 application, so for the assessment... of the data profiling and Data Conditioning & Remediation efforts, ERS would expect to the awarded vendor to do the work. ERS currently is not able to reasonably describe the quantity and quality of the data involved. The question "...where it is currently housed?" is overly broad and vague so it cannot be answered. We can share that the current system utilizes a Database of which the details will be shared with the vendor awarded the contract.

6. **Question:** Can ERS please briefly explain what ERS/State staff will be made available to assist with efforts to document the cloud and software architectures, configurations, and environments and anticipated division of effort on these items (remediation (i.e., how much of this work does ERS expect the awarded vendor to conduct versus ERS/State staff)?

**Response:** Please refer to answer provided to question #2. The ERS does not have a division of efforts and is seeking a vendor with experience to not just advise, but to actively participate in the required migration activities as outlined in the SOW.

7. **Question:** Is the RFP (if one was used) to procure Vitech and the V3locity platform publicly available, and if so can you please provide a link to it? And if it is not publicly posted, could ERS please now provide it?

**Response:** The RFP has not been drafted. We are currently in the assessment phase of this project with Velocity and when completed will have the proposed timelines and activities to draft the RFP.

8. **Question:** Can ERS please provide more detail on its expectations/vision for the level of effort they are seeking for implementation oversight efforts (e.g., does ERS need a full PMO team or does ERS have its own PMO team and the awarded vendor will just be in an advisory capacity)?

**Response:** Please refer to SOW. Our expectations are outlined and our focus with the contracted project manager will be on the deliverables. ERS does not have a PMO, we have a person. SOW in the RFP should determine the "capacity" the offerors will need to advise, perform, oversee, manage and implement on behalf of ERS.

9. **Question:** Can ERS please briefly elaborate on its expectation of Vitech in regard to training development and delivery?

**Response:** Velocity will provided documents (yet to be determined) but not training. That will be ERS' and project managers responsibility (see IT change management and Training Management in SOW).

10. **Question:** The RFP states that: "As indicated by the terms stated in Section 2.2.1, this solicitation is for a multi-term contract. The fixed fee proposed for items 1 through 22 in Section 2.2.2 and the per diem rates for item 23 in Section 2.2.2 shall be the same throughout the contract, except to the extent that price adjustment may be provided in this RFP and the resulting contract."

Can ERS please explain what it is referring to with "items 1 through 22" and "item 23"?

Also, OFFER FORM, OF-1 Fee Proposal does not provide for inputting "per diem" fees. Can ERS please explain/clarify the request?

The RFP also states: "Provide a breakdown of proposed fees by year for the following periods

- Year 1 total costs including a breakdown costs for
  - months 1 to 6;
  - and months 7 to 12;
- Year 2
- Year 3 etc."

OFFER FORM, OF-1 Fee Proposal is not set up to input cost according to time frame—it's set up to input cost by phase. Can ERS please explain/clarify the request?

**Response:** Please provide the fee per ERS's project plan, including a breakdown of the proposed fees by year. At a minimum fees for the first year should be identified by first -six months and second six months for offeror's proposal.

The following is to be deleted from Section 2.3 MULTI-TERM SOLICITATION "The fixed fee proposed for items 1 through 22 in Section 2.2.2 and the per diem rates for item 23 in Section 2.2.2 shall be the same throughout the contract, except to the extent that price adjustment may be provided in this RFP and the resulting contract."

11. **Question:** The RFP states that: "The details of offeror's experience relevant to the proposed agreement shall include a summary of the offeror's experience in conducting information management systems procurements for other government entities, especially statewide public employee retirement systems."

Can ERS please explain/clarify what procurement efforts will be involved with this project?

**Response:** Should the need arise, the insight and recommendations, based on previous migrations, to procure additional resources that provide further assurance that the business (ERS) requirements are being met throughout the migration.

12. **Question:** The RFP states that: "Finally, offerors should also provide a list describing project experience with potential ERS vendors. Due to the size and scope of the RFP, the ERS realizes that there will be a limited number of potential vendors interested."

Can ERS please explain/clarify this language and request, as it appears to indicate that an ERS vendor has not been chosen and that ERS experience beyond Vitech/V3locity is desired and being requested?

**Response:** Velocity is the current selected vendor.

13. **Question:** The RFP states that: "Offeror shall describe in detail how the offeror will provide the services outlined in the Scope of Work. Offerors shall include a project schedule in GANTT chart form that clearly illustrates graphically the estimated start date, duration, and end date for each of tasks described in Section 2 – SCOPE OF WORK. Dates should be expressed relative to the project start date."

The RFP also states: "What is the number of days that this project is expected to take to completion as described in the RFP."

Can ERS please clarify as to whether or not Vitech is responsible for providing a project schedule, as that would be typical of a system implementer/integrator/migrator? And if they are responsible and have provided one, could this please now be provided—or at least estimated expectations for each of the phases of the project?

**Response:** Velocity is responsible for providing a project schedule. They have not provided a schedule but have discussed their delivery approach with 4 proposed phases; a launch phase; an implementation phase; a testing and deployment phase; and a warranty period that are projected to run between 12 and 18 months.

14. **Question:** The RFP states that: "Offeror to provide in their proposal a proposed timeline in Gantt Style format which will describe the Offeror's plan to implement ERS's V3locity Migration Management Plan and provide the proposed number of hours to complete each phase in the work plan."

Can ERS please now provide the V3locity Migration Management Plan mentioned, so that we can provide in our proposal a proposed timeline in Gantt Style format which describes our plan to implement ERS's V3locity Migration Management Plan?

**Response:** ERS does not have the proposed Velocity migration plan.

15. **Question:** Does ERS and/or Vitech plan to use any specific tools/technology for this project (e.g., Jira or Azure DevOps)?

**Response:** Jira and Zephyr, not sure what additional types of tools/tech will be added or used at this moment.

16. **Question:** Other than the 1 FTE staff member that is required to be on-site full-time in ERS' office, can ERS please explain Level of travel/on-site expected?

The RFP states that: "Offeror in its firm and fixed price quote to **exclude travel costs, which shall be reimbursed at face value.** Provide details of expected staff travel during the project such as number of trips and/or, rates, etc. - Offeror to include the hourly rate per hour by staff level."

The General Conditions state that: "Unless prior written approval of the HOPA is obtained, **reimbursement for subsistence allowance (i.e., hotel and meals, etc.) shall not exceed the applicable daily authorized rates for inter-island or out-of-state travel that are set forth in the current Governor's Executive Order authorizing adjustments in salaries and benefits for state officers and employees in the executive branch who are excluded from collective bargaining coverage.**"

**Response:** Travel shall be determined by the offeror, guided by the SOW and included in the price.

17. **Question:** OFFER FORM, OF-1 Fee Proposal states that: "The proposed prices submitted below for services related to the consulting services shall be paid to the selected Contractor. No other request for payment shall be honored. **Contractor(s) shall be responsible for all taxes, fees, licenses, insurance, supplies, travel, and other costs.** No other claims for payment shall be honored."

Can ERS please clarify if travel expenses will be reimbursed?

If travel expenses will be reimbursed, can ERS please explain the methodology for reimbursement?

Can ERS please explain/clarify as to how travel costs should be presented in Offeror proposals, as the instructions seem to indicate that they should *not* be included and there is no separate space in the OFFER FORM, OF-1 Fee Proposal to include them?

**Response:** Travel shall be determined by the offeror, guided by the SOW and included in the price

18. **Question:** Does ERS have an estimated/preferred budget or budget range for these services, and if so can ERS please now provide that amount/range?

**Response:** ERS does not have an estimated/preferred budget range.

19. **Question:** We have a question to better understand how travel should be included. Section 3.10 on proposed fees states: "Offeror in its firm and fixed price quote to exclude travel costs, which shall be reimbursed at face value. Provide details of expected staff travel during the project such as number of trips and/or, rates, etc." We wanted to confirm that we should include our estimate of travel costs and a breakdown along with the bid, and that those costs would be reimbursed providing they follow the terms set out in Section 16 of the General Conditions, but that those costs should not be included in the lines for each phase on the Fee Proposal?

**Response:** Travel shall be determined by the offeror, guided by the SOW and included in the price. Edits to the RFP have been made to reflect ERS' request.