



STATE PROCUREMENT OFFICE
NOTICE & REQUEST FOR SOLE SOURCE

14 MAR -4 P2:21

TO: Chief Procurement Officer

FROM: Department of Taxation

Name of Requesting Department

Pursuant to HRS §103D-306 and HAR chapter 3-122, Subchapter 9, the Department requests sole source approval to purchase the following:

1. Describe the goods, services, or construction to be procured.
The proposed procurement will provide a complete upgrade to the Department of Taxation (Department)'s existing end-of-life Interactive Voice Response (IVR) and Call Center (telephony) solutions.

Table with 2 columns: Vendor/Contractor/Service Provider Name, Amount of Request, Term of contract, and Prior SPO-001, Sole Source (SS) No. Values include Symago, L.L.C., \$126,900.00, 5/1/2014 to 4/30/2015, and 07-040-J.

6. Describe in detail the following:
a. The unique features, characteristics, or capabilities of the goods, service or construction.
In January 2014, it will be 10 years since Symago implemented the initial IVR solution and 7 years since the Call Center telephony solution was implemented.

7. Describe the efforts and results in determining that this is the only vendor/contractor/service provider who can provide the goods, services or construction.

Although this project is being called an upgrade, DoTax is virtually getting a complete replacement solution without having to pay for the software, licensing fees and self-service applications that were previously developed. Since Symago owns the source code, they are the only vendor capable of offering this upgrade, which results in a significant cost savings to DoTax. Although other IVR/Telephony systems exist, Symago has acquired a complete working knowledge of the Dept's operational needs, and has provided an efficient and effective system that has met our needs from their initial implementation to current day. (Con't, please see attached sheet)

8. Alternate source. Describe the other possible sources for the goods, services, or construction that were investigated but did not meet the department's needs.

Two vendors (one from out-of-state and one in Hawaii) who were recommended by other state agencies were investigated and considered; however, from our Department's operational perspective, we found these vendors to be unsuitable for our needs as they could not provide assurances of security to safeguard our confidential tax information, nor the expertise and experience required to provide an IVR/Telephony system that would be suitable for our Department.

9. Identify the primary responsible staff person(s) conducting and managing this procurement. (Appropriate delegated procurement authority and completion of mandatory training required.)

*Point of contact (Place asterisk after name of person to contact for additional information).

Name	Division/Agency	Phone Number	E-mail Address
Annette Yamanuha, Div Administrator*	Tax Svcs & Proc Div	587-3267	annette.m.yamanuha@hawaii.gov
Emill B. Acosta, Acting ASO Officer	Admin Svc Office	587-1501	emill.b.acosta@hawaii.gov

Department shall ensure adherence to applicable administrative and statutory requirements, including HAR chapter 3-122, Subchapter 15, Cost or Pricing Data if required.

All requirements/approvals and internal controls for this expenditure is the responsibility of the department.

I certify that the information provided is to the best of my knowledge, true and correct.


 FOR Department Head Signature

3/3/14
 Date

7. From a day-to-day operational perspective, Symago has proven to be extremely reliable in providing timely service in critical times, which is paramount for the service that the Department must provide to the public. If another vendor is used, we would have to recreate every aspect of our call scripts, messages, report requirements, etc. that we have refined over the years with Symago, and have proven to be successful for our operational needs. Also, the testing for the upgrade would be minimal, while a new system would require a major testing effort with resources that are currently unavailable.

For Chief Procurement Officer Use Only

Date Notice Posted: 3/5/14

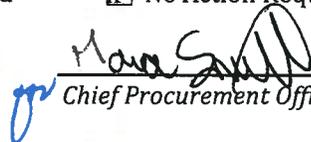
Submit written objection to this notice to issue a sole source contract within seven calendar days or as otherwise allowed from date notice posted to:

state.procurement.office@hawaii.gov

Chief Procurement Officer (CPO) Comments:

Request is returned with no action required as department has decided to withdraw their request for sole source. If there are any questions, please contact Stanton Mato at 586-0566, or stanton.d.mato@hawaii.gov.

Approved Disapproved No Action Required



Chief Procurement Officer Signature Date 6/1/14