



**State of Hawai'i
Office of Enterprise Technology Services (ETS)**

PACXA RESPONSE TO

RFI for Internet Portal Manager and Service Provider

For Public Inspection

REQUEST FOR INFORMATION No. : ETS.FY18.RFI.001

August 9, 2017

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1.0 Transmittal Letter



August 9, 2017

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Subject: State of Hawai'i Internet Portal Manager RFI # ETS.FY18.RFI.001

Together with Adobe Systems Incorporated ("Adobe"), Pacxa is pleased to respond to this Request for Information from the State of Hawai'i, Enterprise Technology Services (ETS) for an enterprise portal and managed services solution. In response to the RFI's written questions, we have provided company information, technical information, and solution details.

Pacxa and Adobe provide an innovative approach to re-platforming your existing portal with incremental cost to the State while redirecting revenue into your departments rather than to a third party. Our solutions power the next generation of web portal, content management, and digital marketing strategies for better citizen engagement.

Adobe products offer creative and mobile software solutions that can revolutionize how the State of Hawai'i engages with constituent ideas and information. Our tools allow two-way dialogue between government and citizens of Hawai'i with immediate feedback as to how government services are being met. We look forward to working with the State of Hawai'i's ETS team throughout your evaluation process.

Leading government agencies-- such as City and County of Denver, San Diego County, the State of Tennessee, and the Government of Canada--have built their portal, web content management, and digital transformation strategies on the Adobe Experience Cloud platform. We look forward to demonstrating how we can add value to your identified organizational plans and goals.

It would be our pleasure to participate in oral presentations, question-and answer sessions, or other fact-finding activities to present our approach and strategy to the State of Hawai'i.

If you require additional information or have questions, please contact us as listed below.

Sincerely,

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2.0 Executive Summary

We Understand the State of Hawai'i's Challenges

As the State of Hawai'i continues to evolve, there is recognition of a need to advance technology to improve the citizen experience and a keen desire to market government services more efficiently. Using a digital platform that will enable government agencies to attract businesses and millennials to state government is a critical success factor for Governor Ige. With the State of Hawai'i's desire to retain their best and brightest to work in government, using modern tools will help attract potential employees to backfill the large population of state retirees.

The State will collect transaction-level data and engage citizens via data-driven strategies that drive engagement and long-term relationships with government. The Department of Commerce and Consumer Affairs and the Department of Human Services have already started their digital transformation with Pacxa and Adobe. The State of Hawai'i is under intense pressure to rapidly create, manage, deliver, and optimize digital experiences for citizens, businesses, and tax payers receiving information via websites, mobile, POS, etc. and providing personal and contextual relevance for recipients of services.

Pacxa and Adobe understand that the State of Hawai'i is seeking new ways to improve the citizen experience in an increasingly digital world. Pacxa and Adobe seek to reduce the cost of transactions and to keep more revenue within State departments, improve SLAs, and rollout new technology features department by department. Our combined approach is a phased rollout, training current state employees using the best digital platform. Through more effective content reuse and planning while reducing the complexity of working with content, the Pacxa and Adobe team will develop an enterprise strategy for web and citizen-facing apps, improve online channels, and increase site visitors & conversion rates.

The Solution: Adobe Experience Cloud – The Leading Portal WCM solution for Government

Adobe Experience Cloud provides a browser and touch-based user interface for government to create interactive, multi-channel citizen experiences that build an engaging digital presence, drive more effective campaigns based on relevant and personalized constituent information, and grow online social communities—all on a common platform.

The Adobe Experience Cloud also empowers IT with unified tools and a platform to rapidly develop and deploy new templates, designs, governance, and components for web, mobile, and social channels. Leveraging a common solution, agency business users and IT users can easily manage the complexity of creating unique government experiences on owned digital properties to enhance the



State of Hawai'i brand with citizens, tax payers, and businesses. Key components of our award-winning platform include the following:

- **Web Content Management:** A robust content management solution with a unified and consistent customer experience across all devices. The State of Hawai'i authors should be able to quickly and effectively create, manage, and deliver relevant content to citizens with personalized audience segments.
- **Rich Media and Digital Asset Management:** Content repository and asset management user interface. Full asset life cycle tool including create, annotate, approve, edit, and publishing of assets. Asset versioning, digital asset rights management, metadata, renditions and workflow management.
- **Mobile Marketing:** Update and manage content for multiple platforms and mobile browsers without going through a developer. The State of Hawai'i authors will be able to develop mobile compatible web content through a single platform.
- **Content Optimization:** Search engine optimization, scheduled content delivery, continuous site improvement, multi-site management, and analytics.
- **Automation and Localization:** Attribute association, syndication to downstream systems, and other advanced capabilities.
- **Social Capabilities:** Social logins, plugins, comments, rating, communities, blogs, groups, social calendaring, badging, user-generated content, moderation, etc.
- **Workflow/Approvals:** Robust workflow management and approval capabilities.
- **User Management:** Configurable user management capabilities for internal and external affiliates.

How Industry Recognizes Us

“Adobe has parlayed its leadership in creative tools and its relatively early commitment to marketing analytics and cloud-based deployment into an offering of considerable breadth. The addition of its multi-application artificial intelligence (AI) services layer, dubbed Adobe Sensei, shows considerable promise for enhancing the power of core marketing products” — Gartner Magic Quadrant for Digital Marketing Hubs, Q1 2017





Gartner Magic Quadrant for Digital Marketing Hub



Adobe Experience Cloud: The Right Choice for the State of Hawai'i

In summary, the Adobe Experience Cloud provides the State of Hawai'i with the most complete set of content/asset management capabilities in the market, from increased solution integration within the digital marketing ecosystem to our integrations with other key State of Hawai'i solutions and external partnerships. We're confident these current capabilities and the strategic vision for web content management (and Experience Cloud suite overall) can meet your key objectives while providing a truly-innovative and market-leading solution to future-proof your investment.

Sample Customer References

San Diego County uses the Adobe Experience Cloud platform to overcome lack of citizen engagement and static content.

- Improved and personalized web content for citizens, content changes are made monthly driven by click and pathing measurements by departments.
- Accelerated time to market for new experiences from months to two weeks—from initial idea and testing to final deployment.
- Improved communications across agencies with rich data and clear communications.





- Reduced content management footprint from 40 different solutions to one consolidated platform.

VISITFLORIDA increases web traffic and achieves steady growth using Adobe Experience Manager.

- Adobe Experience Manager helped VISITFLORIDA launch their new site with a responsive design in weeks.
- The key benefits they received from the solution include the following:
 - Achieved 9M mobile impressions, a 21% increase in mobile traffic
 - Organic search traffic increased by more than 33% in one month and nearly 16% year-over-year
 - Drove 210,000 daily listing views and a 49% increase in traffic to partner sites from the Deals page
 - Realized a 200% increase in site performance
 - Made changes to the website in 15 minutes that used to take several days



3.0 Desired Portal Improvements

A. Future Plans

ETS is planning to transform its Internet portal capabilities to support a more consistent and standardized implementation process, deliver best-in-class effectiveness, improve customer satisfaction, and achieve cost efficiencies for the deployment of new services. ETS is requesting feedback from participants in the market about the benefits and measures described below and other potential benefits it should receive from its Internet portal.

Pacxa/Adobe Response: Adobe Experience Manager (AEM) empowers public sector organizations like the State of Hawai'i with the ability to design, manage, and deliver best-in-class, citizen-facing digital experiences across every channel including web, mobile, social, and video. The AEM solution spans web content management, digital asset management, mobile apps, social communities, and forms automation. AEM integrates with other Adobe Experience Cloud solutions, allowing the State to use analytics to deliver targeted content to identified segments and transform static content into engaging, personalized experiences.

The Adobe Experience Manager platform is uniquely positioned to provide the state with a solution that will improve the Hawaii.gov portal for the benefit of the public and the State. Specifically, as requested within the RFI, AEM will help improve:

- **Functionality, ease-of-use, and flexibility of the portal for the public** – AEM provides the State with unified tools and a platform that both business and IT users can use to easily manage the complexity of creating unique customer experiences within the context of its new portal. AEM provides an open, standards-based platform that leverages common standards, shared core services, micro services, and APIs that allow for extensibility, flexibility, and easy integrations. In the sections that follow, we highlight the features of AEM, along with a recommended road map for achieving the successful digital transformation of the state portal and associated processes.
- **Financial aspects of the portal, including increasing the revenue the State receives from the portal and decreasing its operational costs** – The AEM platform provides a powerful personalization engine that integrates seamlessly with our industry-leading web analytics and marketing campaign solutions. These components can be used by the State to provide its citizens with focused, targeted content and effective outreach that not only improves the overall user experience, but that will help the State drive desired outcomes, including increased revenue from the portal. Because AEM can be used by



Departments to create and maintain portal pages and applications with minimal involvement from IT, and because AEM automates common operations - including site publishing activities, site translations and form submissions, operational costs can be significantly reduced.

Steps for Digital Transformation Success

As stated within the RFI, “ETS is planning to transform its Internet portal capabilities to support a more consistent and standardized implementation process, deliver best-in-class effectiveness, improve customer satisfaction, and achieve cost efficiencies for the deployment of new services.” To achieve these goals, Adobe believes that State portal will require a true digital transformation. We believe that with the right tools and processes, this transformation can be achieved. In the sections that follow, we outline a series of recommended steps and corresponding technologies that will improve the portal and help the State achieve the next generation of government services.

1. Recognize the Value of Creativity

The digital transformation process opens the door for new efficiencies and capabilities, but creativity is just as important as a new portal platform. Our conversations with public sector employees showed that they view creativity and innovation as part of their mandate, but feel restricted by outdated IT policies, lengthy approval processes, and emphasis on efficiency over creativity. Turning these constraints into opportunities is the main challenge for many government creatives. By providing the right tools and processes, the State can foster creativity and leverage content generated by employees as well as content generated and submitted from its citizens in the form of user generated content (UGC).



The AEM platform integrates seamlessly with the Adobe Creative Cloud, the world’s leading suite of desktop publishing tools, including Adobe Photoshop, InDesign, and Illustrator. The AEM platform includes a digital asset management (DAM) repository that is shared with tools that are used to create Portal web pages, mobile sites, mobile applications, social media posts, and high-volume digital marketing campaigns that includes both e-mail and print. A screenshot of the AEM digital asset management user interface is shown in *Figure 1* below.

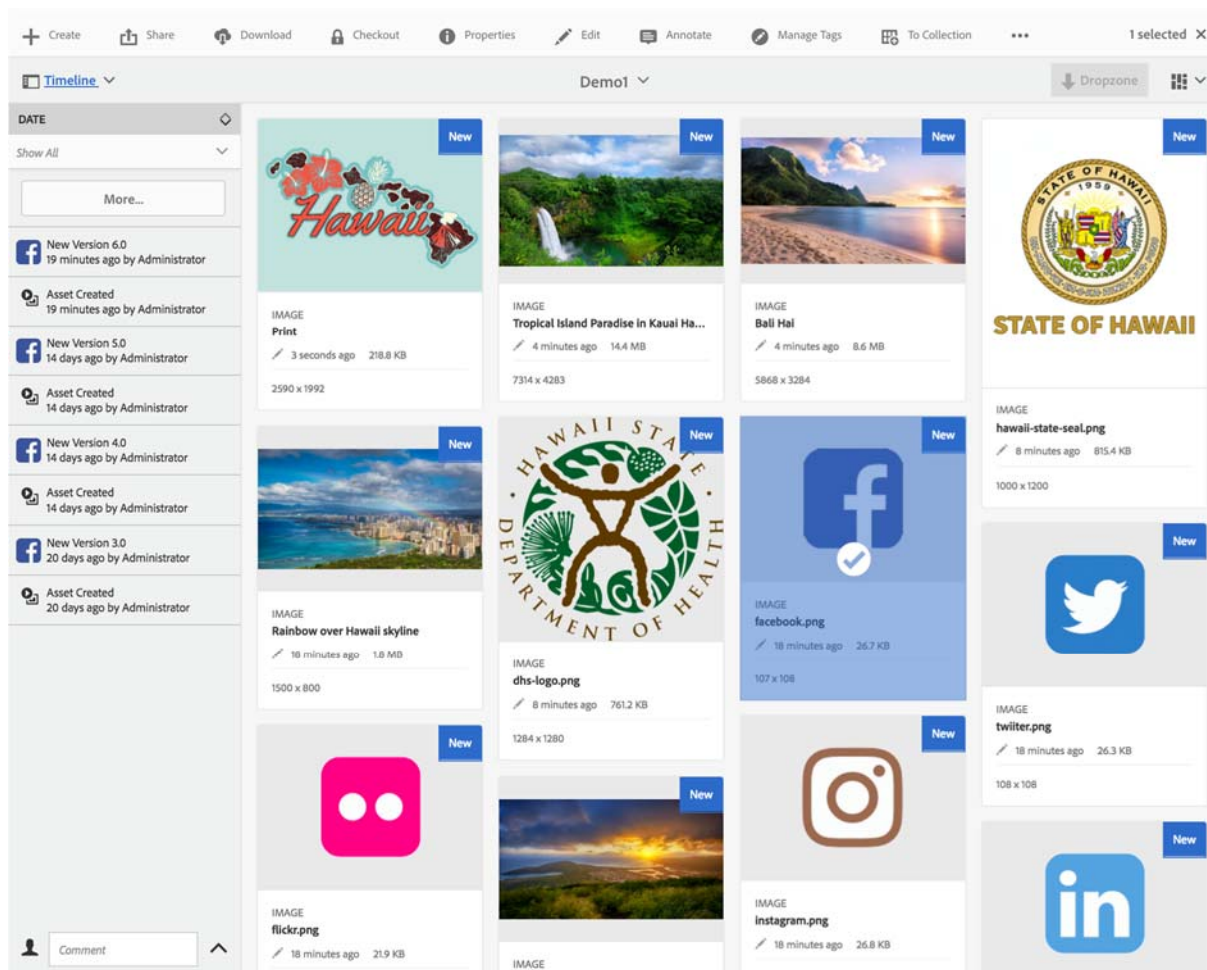


Figure 1. AEM Digital Asset Manager (DAM) provides the State with a shared common repository for all digital portal assets

Adobe Experience Manager and its DAM repository will allow the State to regain control over your digital assets to deliver high-quality brand, campaign, and content experiences. Through its deep integration with Adobe Creative Cloud, State business users and developers can collaborate with creative professionals and digital agencies to simplify planning, production, search, and global distribution of product shots, images, banners, and other valuable content. With Adobe Experience Manager, the State will be well equipped to create valuable experiences that strengthen brands, accelerate campaigns, and increase the ROI of customer-facing content. Key benefits of our proposed solution include the following:

- Deep integration with the Adobe Creative Cloud
- Content repository with browse and asset management user interface
- Asset comment and annotate features
- Metadata, rendition, and workflow management



- Rights management and versioning capabilities
- Smart Tags that leverage machine learning to tag images automatically with useful metadata, allowing easy image discovery by marketers

With Experience Manager, you can easily manage images, videos, and other assets across every digital channel to deliver better customer experiences:

- *Dynamic Media*: Work with a single set of master assets and serve unlimited variations, including size, color, format, resolution, and crop.
- *Video*: Create, manage, and deliver interactive video. Make it available to all screens and devices with a single URL.
- *Personalized Media*: Test and preview content variations on your sites to deliver experiences tailored to individual customers. Help customers personalize product options before they buy.
- *Advanced Search and Metadata*: Automatically assign metadata to assets, and instantly create shareable assets based on search attributes.
- *Project and Workflow Management*: Plan, review, and approve the production of marketing assets using project templates and simple workflow tools.
- *Managed Services Offerings*: Store your assets in the cloud with Adobe as your single partner for hosting, security, and support.

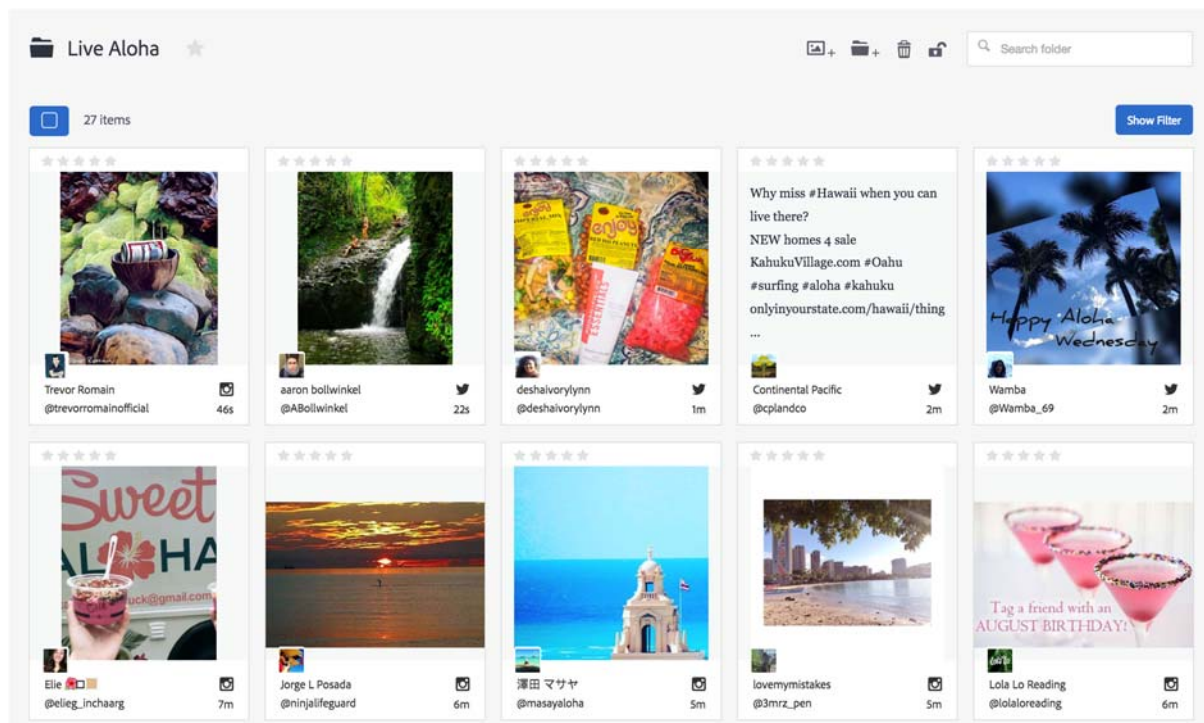


Figure 2. Using Adobe Livefyre, the State can leverage user generated content (UGC) to lower costs associated with content creation

In addition to fostering creativity by State employees and contractors, the State can also leverage creative content generated by its citizens and visitors to the state. The State of Hawai'i is one of the most beautiful places in the world, with literally thousands of photos and comments posted to social media every day. Using our tool, Adobe Livefyre (as shown in *Figure 2*), this type of user generated content (UGC) could be collected and incorporated into the State's portal and other departmental web sites, including the eHawaii.gov photo pool and Discover Hawai'i pages.

Adobe Livefyre provides the ability to create saved searches, as shown in *Figure 3*, to find UGC on all popular social media channels, including Instagram, Twitter, Facebook, and YouTube. Filters can be set to filter out objectionable content and collected content can be reviewed and approved before it is published.

Livefyre is tightly integrated with the AEM DAM repository, providing the ability to search for the best social content on the web, directly within the Assets interface, and store both user-generated content and brand-created content in a single place. Livefyre's rights request workflow has been built into Assets as well, making it easy to get explicit rights, and removing the legal worries of working with user-generated content. You can also pull Livefyre social content from Assets in and out of the Adobe Creative Cloud for editing purposes, accelerating



asset creation. By leveraging UGC, the burden on State staff of having to create all portal content themselves will be reduced, thereby lowering the costs of portal operations.

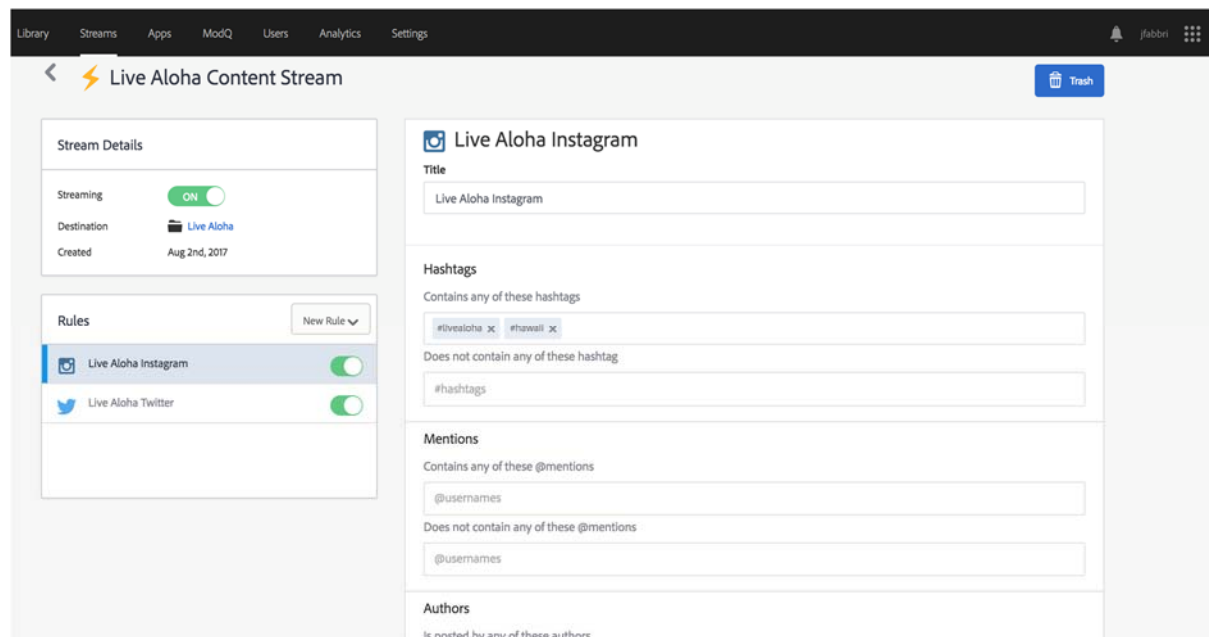


Figure 3. Create saved searches to find UGC on all popular social media channels.

Many public sector organizations are successfully using UGC to help lower the costs associated with content creation. As an example, Tourism Australia uses AEM and Livefyre to automate their methods for finding, moderating, storing, and organizing tourism related UGC. As a result, the tourism board’s small team is able to feature a live feed of UGC on Australia.com, showing visitors what it’s like to visit the Land Down Under from other travelers’ perspectives.

According to John Mackenney, General Manager of Digital Transformation at Tourism Australia, “Livefyre created greater efficiencies in organizing content, storing our assets, and rights management — it’s definitely helped take us to the next level.” Tourism Australia launched a new Aquatic & Coastal campaign on Australia.com, using UGC they collected and managed with Adobe Experience Manager and Livefyre, resulting in a 30 percent increase in site engagement, a 66 percent increase in time spent on site, and 77 percent more leads for the tourism board to pursue.



2. Transform Constituent Service Experiences

The citizens of Hawai'i know exactly what content and channel is best for them at any given moment and are demanding services from the State through their preferred channel. They want the flexibility of conducting business on the go, they expect their government to deliver consistent and personal cross-channel experiences. Because they cannot go to another competitor as they would in the private sector, failing to meet these expectations can lead to frustration. The Adobe platform can help the State to modernize its portal and automate processes to truly revolutionize the way it interacts with the public.



Make Personalization a Top Priority

The future of digital transformation is personalization. With all the digital touch points that people access today, there should be no need for them to search for relevant content. That content should find them. The citizens of Hawai'i should be able to access websites and be prompted with government services and content that is relevant to their “profile” based on a set of historical attributes and data that the State has captured. This includes anonymous users, which may include tracking recently viewed pages on the Hawaii.gov portal, recently viewed pages on third-party web sites, recent purchases, geolocation data, etc.

For authenticated users, the profile is even richer and can include demographic data and income levels as well as a list of current services or programs for which they may be enrolled. This profile data can be used to segment and target content to users – i.e. if someone recently purchased fishing gear from a third-party site, targeted content can encourage the user to apply for a fishing license. If the person is a known user who currently owns a fishing license – targeted content might suggest that they purchase a lifetime fishing license. By understanding its users and targeting relevant content to its users, the State can significantly increase revenue generated from its portal.

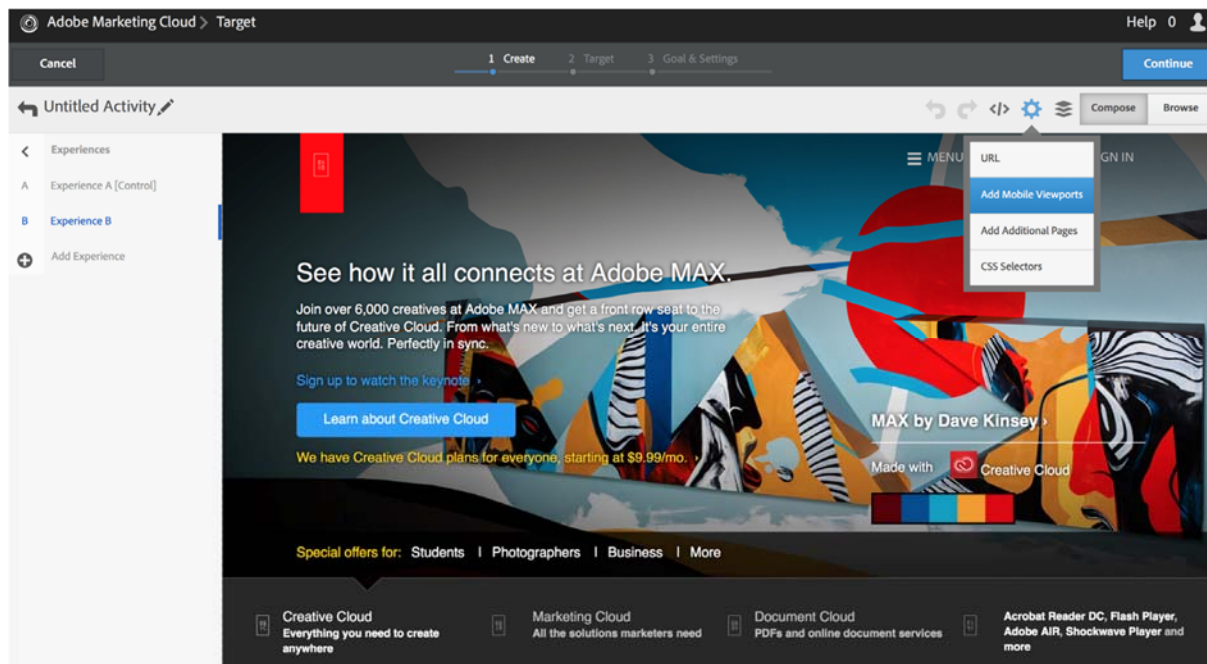


Figure 4. Adobe uses Target to drive increased revenue for its portal – www.adobe.com

Today, the public sector has the opportunity to dramatically change the way they deliver services to citizens. The emergence of new tools, technologies, and methods creates an opportunity to provide revolutionary services, but agencies need to think like their customers by adopting a customer-centric approach. To improve how government delivers customer service, it is important to understand what moments matter for customers, their experience with your service, and how experiences are perceived and remembered.

And that starts with building a customer-first culture with people as the primary focus of interactions. Great customer experiences require four key components: compelling content, personalized service, useful services, and customer service that is available at every touch point. With these qualities, the State can create a real connection with your customers – enabling transparency and building trust.

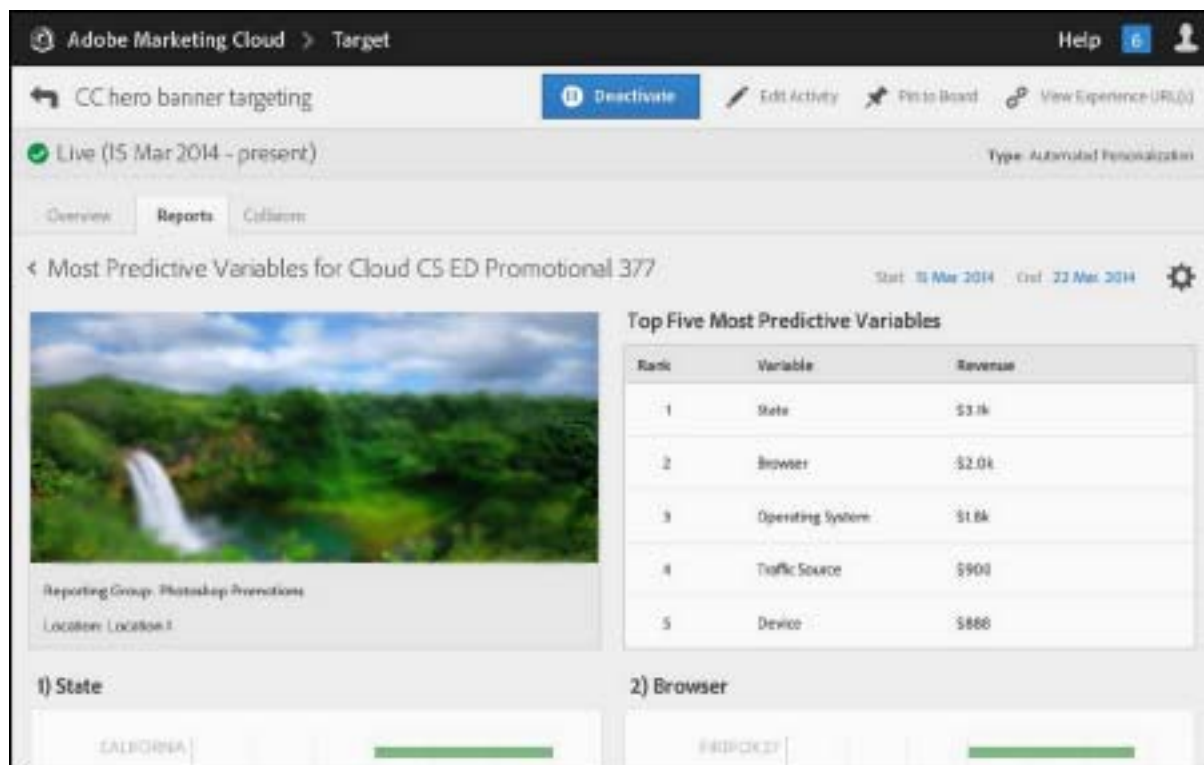


Figure 5. Automate real-time decisions with a sophisticated, self-learning targeting engine

Adobe Target, Adobe Analytics, and Adobe Audience Manager can be combined to provide the State with a sophisticated and powerful set of personalization capabilities that will help improve the customer experience and drive portal revenue. Using the integrated platform, business rules can be defined to target specific visitor groups with content that is more likely to engage and convert. State employees can select and enter criteria to define the business rules—for example, an offer for camping permits could be targeted to visitors who live in or who are staying in a specific area on one of the islands, while presenting a general overview of the types of camping facilities available state-wide to other visitors to the portal.

Using Adobe Target, the State can perform A/B testing to determine which targeted set of content or “experience” has the highest conversion rates. In other words, which experience has the desired effect or outcome.

As an example, assume the targeted audience are people who may be planning a wedding (based upon anonymous, third-party data of people who have recently visited wedding related sites). Several experiences could then be created and targeted to this user segment, each of which may have different photos, different text and different placements of buttons, etc., with the desired conversion being that user clicks on a button and applies for the permit.



Adobe Target can track this behavior, declare a winning experience and automatically adjust the experience for future users. A/B testing is very powerful tool. Our studies have shown that by using A/B testing, conversion rates can be increased by as much 50%.

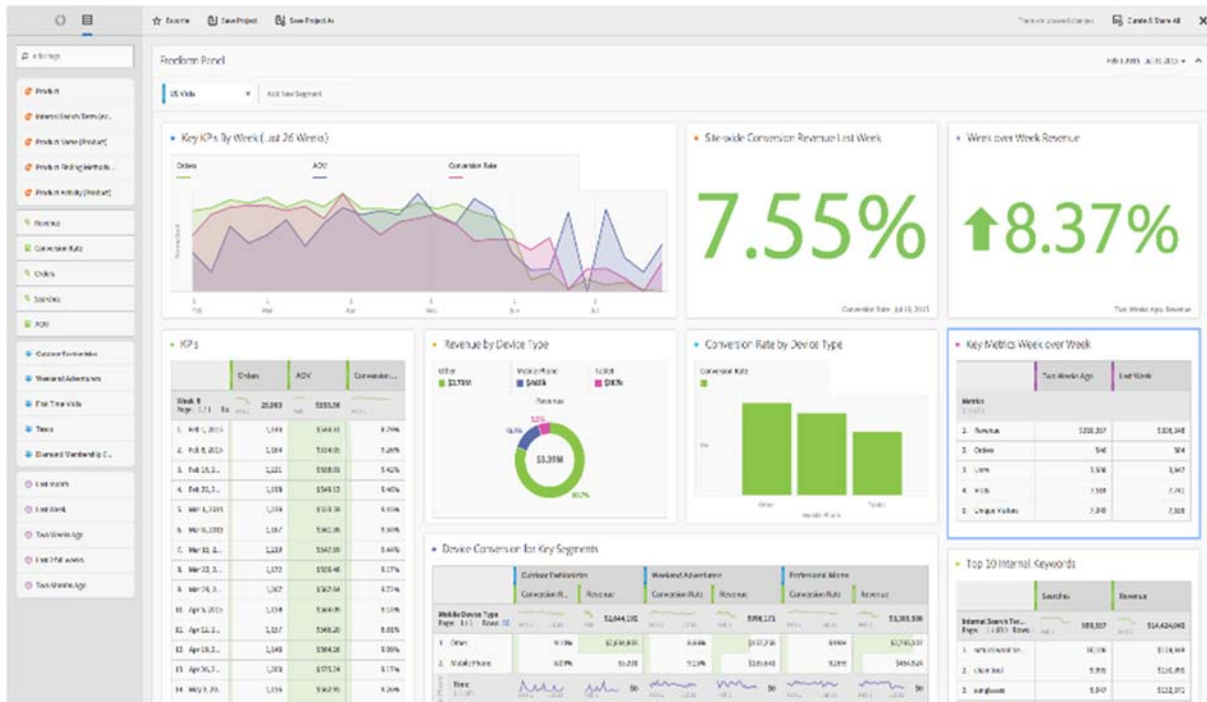
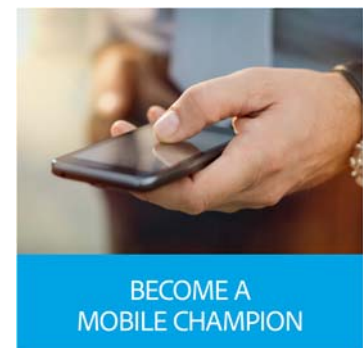


Figure 6. Understand your users with Adobe Analytics, the most complete and flexible web-analytics tool available

Sometimes the number and complexity of segments makes managing rules difficult. Other times the visitor’s intent or the best layout or design is not clear enough to use rules-based targeting effectively. Adobe Target also provides machine-based learning and algorithms that can predict how and what to target automatically. Furthermore, Adobe Target is tightly integrated with Adobe Analytics and Adobe Audience Manager, which facilitates better audience segmentation, as shown in Figure 6, improving the effectiveness of targeted content.

3. Become a Mobile Champion

A 2015 Pew Research Center study found that 68% of U.S. adults have a smartphone and 19% of Americans rely to some degree on a smartphone for accessing government services and information; either because they lack broadband at home or have few options for online access other than their cell phone. If smartphones are the main Internet access point for nearly one in five Americans, mobile access





needs to be an important consideration when re-implementing the State portal.

Mobile solutions can also benefit State employees. Government workers are on the go as much as anyone else in the digital age. Ninety-five percent of them agree mobile is transforming the face of creativity and design. Using mobile allows employees to collaborate, create content anywhere, and capture inspiration in the exact moment it happens. On-the-go creativity is a way to inspire employees, who sometimes find themselves in an environment that can stifle the creative process.

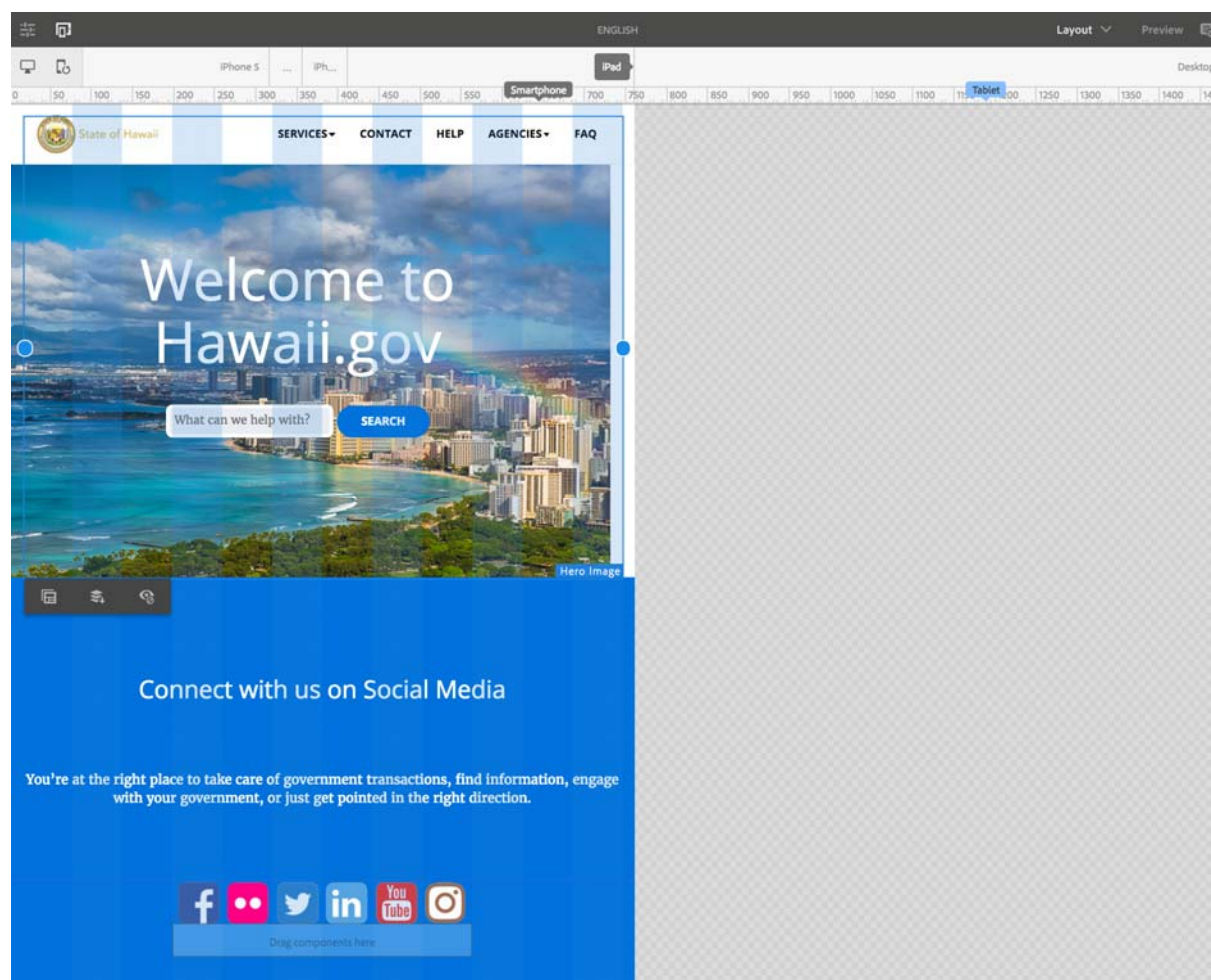


Figure 7. The AEM Sites tool and device emulator can be used to easily create layouts for all screen sizes

The Adobe Experience Manager Sites module can be used to quickly and easily maintain public-facing websites and applications tailored to the needs of citizens using mobile devices. Adobe has government customers at the federal, state, and local levels implementing Adobe





Experience Manager across their systems and providing seamless mobile experiences for their citizens. Using the AEM Sites module, as shown in *Figure 7*, business users can quickly and easily adjust the layout of a web page without having to write any code.

Using the device emulator, users can preview the site on any device size - including desktop browsers and common mobile devices. Creating web sites that scale seamlessly across any device can be problematic with other solutions requiring long development cycles involving developers well trained in JavaScript and CSS. AEM Sites makes the process of creating and maintaining a responsive site much simpler, which will minimize IT involvement and lower the cost associated with maintaining the State portal.

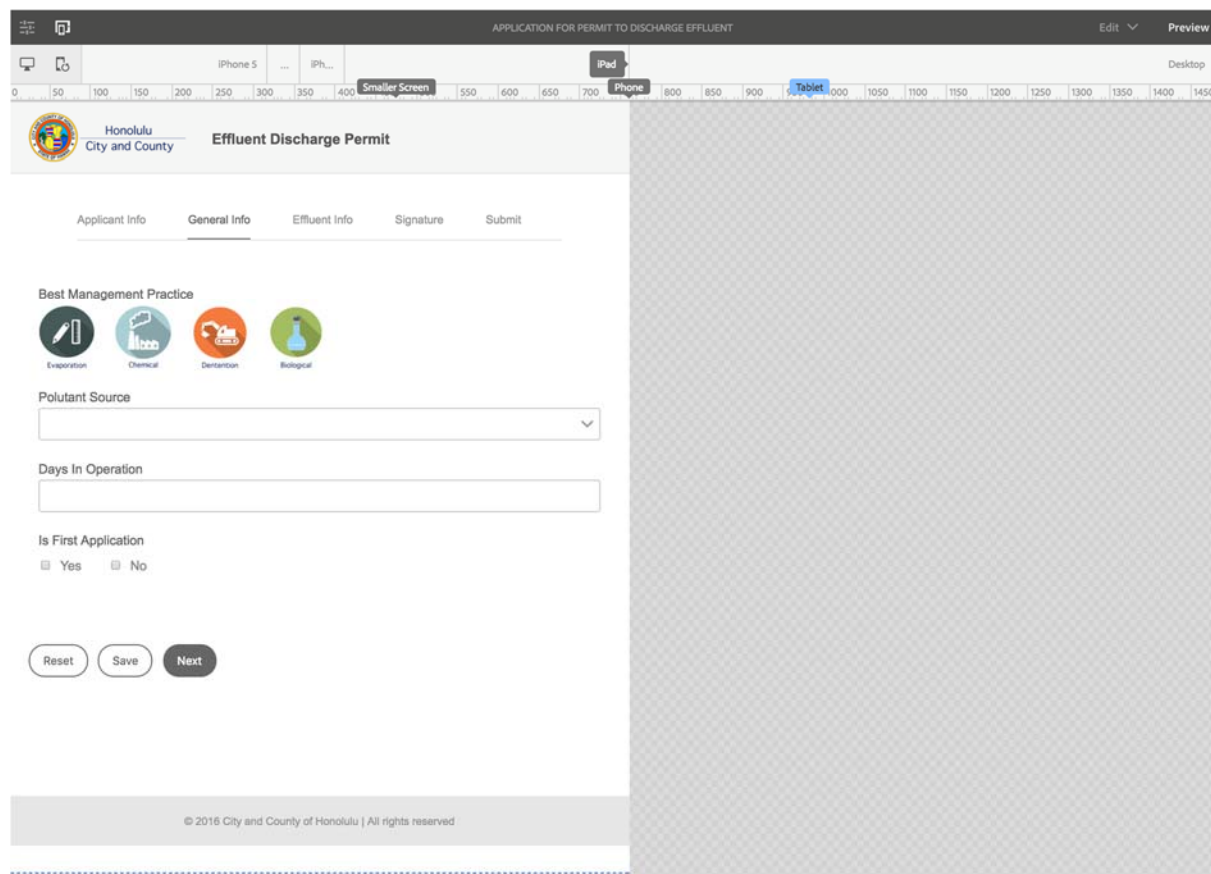


Figure 8. AEM Adaptive forms can be utilized to capture information across all device sizes

Similarly, as shown in *Figure 8*, the AEM Forms tool can be used to create online web forms that can be optimized to fit any screen size. AEM adaptive forms are created using the same UI that business users use to create and maintain web site pages.



4. Get Efficient

With the rapid shift from in-person transactions to digital interactions, comes a mountain of data and seemingly unlimited opportunities to improve the customer experience.

Keeping up with user expectations in this multi-channel world requires an investment in the right resources. Here are key ways the State can embrace the shift to digital while improving efficiency and reducing cost.



Move to the Cloud

Cloud-based solutions will allow the State to streamline processes and stay connected with real-time tracking and interaction. In addition, cloud services allow for continuous innovation, ensuring that the State portal and supporting platform remains at the cutting edge while minimizing costs and reducing the burden on IT staff. At both the federal and state level, policymakers are increasingly turning to the Cloud.

Adobe and our partner Pacxa can provide the State with a cloud-based portal solution, including selected Adobe Experience Manager capabilities pre-installed and configured according to your specific requirements. Following system delivery, pre-launch testing and production go-live activities are performed. Once in production status, the Adobe Managed Services team provides continuous operational monitoring, emergency response, security and feature upgrades, and periodic performance tuning. More detail on our Adobe Managed Services offering is provided in later sections.

Write Less Code

Using Adobe Experience Manager Sites, the look & feel, layout, and responsive design of the new portal can be implemented with a minimal amount of custom code. Custom code is expensive to write, test, and maintain. Using the AEM platform, State employees can create and maintain web pages with minimal involvement from IT. AEM Sites provides an open, standards-based platform for delivering engaging, personalized, multi-channel customer experiences. AEM Sites includes the following powerful features:

- *Experience Fragments:* Compose and deliver experience fragments that include both content and layout destined for various channels that can be managed either from within or independent of Experience Manager. Now, you can better control the look and feel of the experiences you design, whether your brand content appears on your owned web properties, or affiliated properties, like Pinterest and Facebook





- **Content Fragments:** Content fragments enables authoring in a more modular and abstracted fashion, where content delivery is not bound to a specific channel. AEM Sites now automatically creates different versions of your content and allows you to synchronize variations of the same text and any associated mixed media everywhere—across all pages, all channels, all devices—whenever content fragments were reused.
- **Production-Ready Components:** Go live faster with Adobe-vetted, production-ready components that can dramatically reduce development time. Curated with best practices in mind, these components provide a solid start to digital foundation projects without having to recode or customize your own
- **Activity Maps:** Integrate with Adobe Analytics and bring analytics overlays and activity maps right inside the Experience Manager authoring environment. See the variables and KPIs set for your content — like clicks, downloads, and time spent—so you can easily measure and optimize digital experiences as you create them

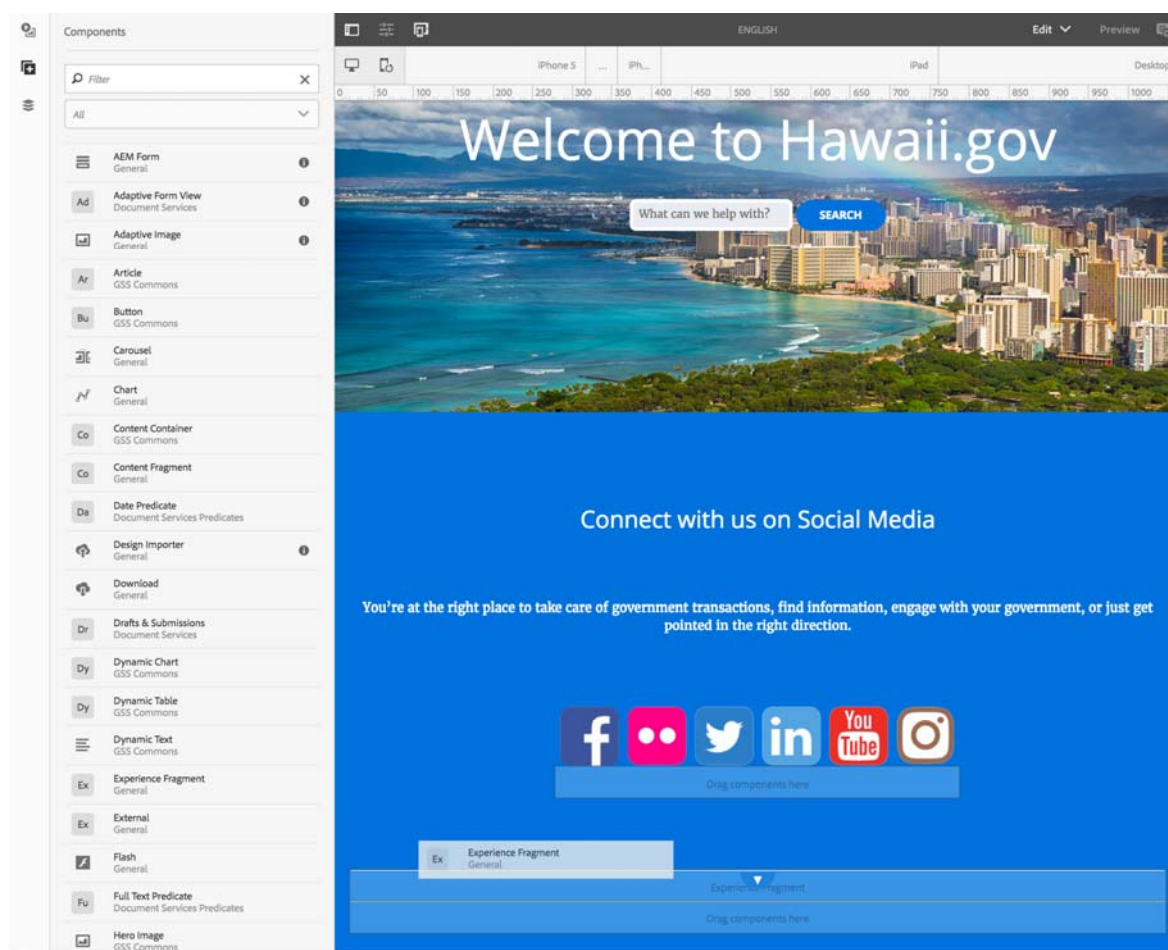


Figure 9. Using AEM Sites editor, business users drag & drop pre-defined components onto the page



As shown in

Figure 9, content editors work with a user-friendly, drag & drop interface. The content editor UI is linked seamlessly to the Experience Manager DAM repository to provide access to approved, shared content - including photos, videos, sound files, and documents. In addition, the editor provides spell-check functionality, access to version control, tagging, and audit-log capabilities.

Automate Manual Processes

The Adobe Experience Manager platform will allow the State to automate many of the processes associated with managing the new portal including site publishing activities, site translation, digital asset processing and content personalization.

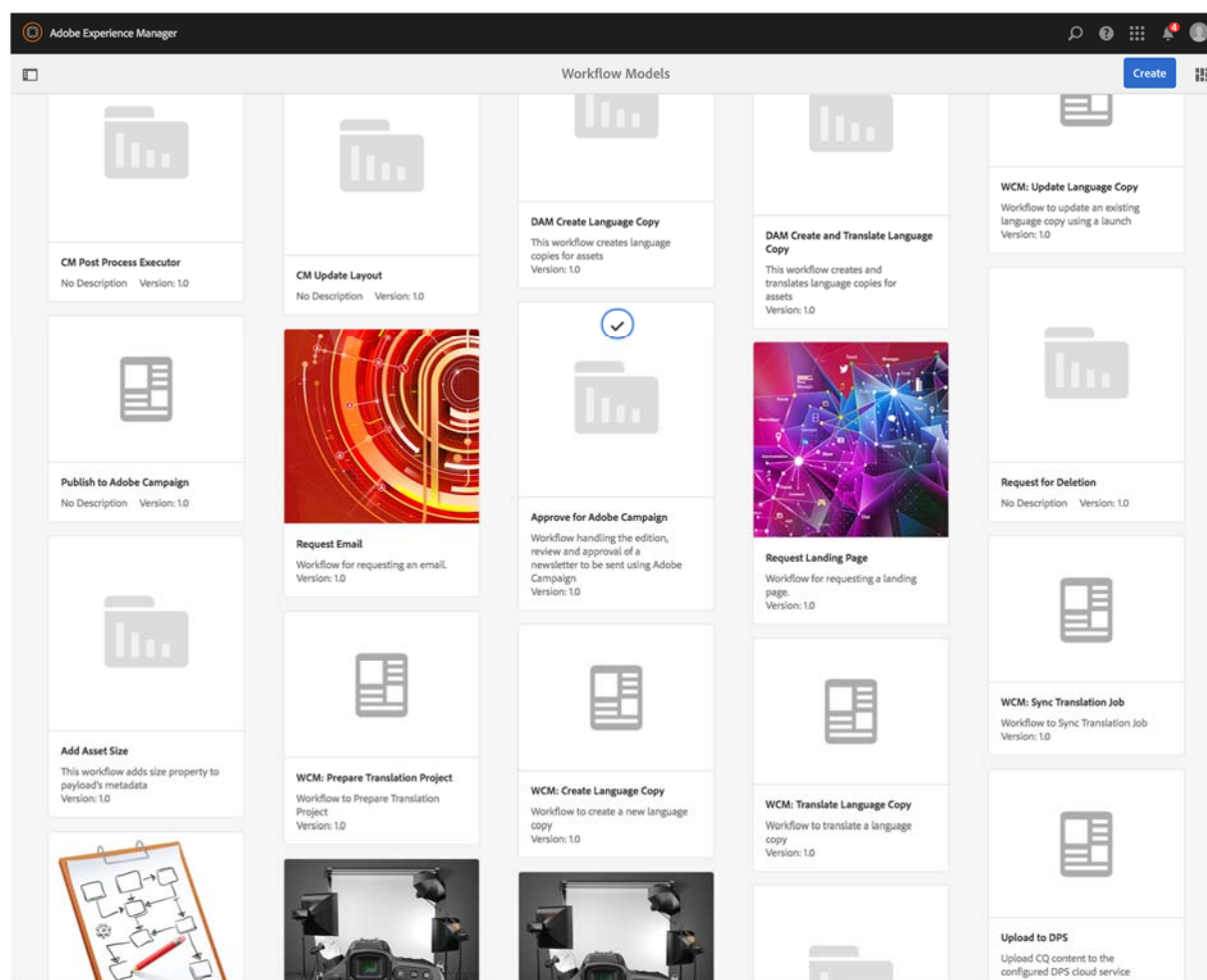


Figure 10. AEM includes built-in workflows that automate common site editing and publishing tasks

AEM includes dozens of workflows that can be customized to meet your requirements. AEM provides site translation workflows that integrate with machine-based translations services,





including Microsoft and Google. When photos are added to the DAM repository, workflows are executed that automatically process the photos, including creating multiple renditions, each of which is appropriate for display on a particular screen size. The workflows also include auto-tagging of photos. Additionally, publishing workflows can be implemented that automate the review, approval, and publish activities. The workflow capabilities of AEM are big time saver that will help reduce the cost associated with maintaining the new State portal.

Digitize Forms and Documents

At Adobe, we recognize the importance of modernizing the way we collect and share information. From filing taxes to paying parking tickets and renewing driver's licenses, forms are an integral part of the State's interactions with citizens. The State can modernize this key touch point with citizens by improving its online forms capability.

Honolulu City and County Effluent Discharge Permit

Applicant Info General Info Effluent Info Signature Submit

Form Submission

Please fill the following form.

City and County of Honolulu STATE OF HAWAII

Application for Permit to Discharge Effluent

Applicant Information

Applicant Name John Doe

Email Address jdoe@gmail.com

Street Name Kaneohe Bay Dr

Zip Code 96744

City Kaneohe

State Hawaii

Reset Save Submit

Figure 11. Online form data can be rendered as PDF and viewed by user before submitting, serving as document of record

Using Experience Manager Forms, the State can make its form and document processes paperless and efficient. When combined with automated workflows that facilitate integration with back-end systems, including databases, document management, payment processing,





CRM and financial systems, the State can transform complex transactions into simple digital experiences - anytime, anywhere, and on any device. Our AEM Forms solution includes the following features:

- *Business-friendly authoring*: Create new forms faster than ever with easy drag & drop authoring for business users. Even complex input types like HTML5 and CAPTCHA are now available. Users can also assign rules and role-based access controls such as dynamic field display - all without writing code.
- *PDF-Based Document of Record*: Leverage investments in existing PDF-based forms by merging data from online form submissions and using resulting PDF as the document of record that can be viewed before submitting as shown in *Figure 11*.
- *Easily scale across multiple channels*: Create consistent form and document experiences across channels with enhancements to the documents of record and theme editor. And now, you can manage branding configurations, create reference base templates, translate form content, integrate to Web fonts, and create forms based on JSON schema data.
- *Enhanced integration with Adobe Sign*: Extend e-signatures to multiple signers, including sequential and parallel signing scenarios. Allow verification for anonymous signers via authentication from e-mail, phone, Google, Microsoft, Facebook, LinkedIn or various knowledgebase sources. Other enhancements include support for OAUTH implementation and a workflow step for Sign e-signatures.
- *Add workflows fast for lower total cost*: Build form workflows with less set-up time less need for extra processing servers. Now, the Forms dashboard leverages the Experience Manager Inbox to initiate and manage user-centric form applications. And you can easily add steps for document services and digital signatures with Adobe Sign.
- *Updated document security*: Expanded to support Office 2016 as well as authentication for Office Extension, Forms now lets you index DRM-protected Office documents in Experience Manager. You can also extend document protection rights on behalf of another user, so users who set-up document protection rights won't automatically have read-rights on protected documents

5. Perform Effective Outreach





Creating a successful outreach strategy is an important step in the Digital Transformation process. Outreach, in the form of personalized e-mails, text messages, social media posts, mobile app notifications as well as direct mail can serve to encourage the citizens of Hawai'i to use the new State portal and associated self-service opportunities, as well as to drive additional revenue for the portal, e.g. by recommending fee-based services.



Using Adobe Campaign, workflows can be defined that automate common tasks such as sending an e-mail based upon certain events – for example, a user saves a draft version of an application for a hunting permit, but fails to complete it after a period of time. Using Adobe Analytics data, these events can be much more sophisticated. When a known user views pages on the site related to starting a new business, a workflow could be triggered that sends the person an e-mail within additional information about the process and a link to an online application.

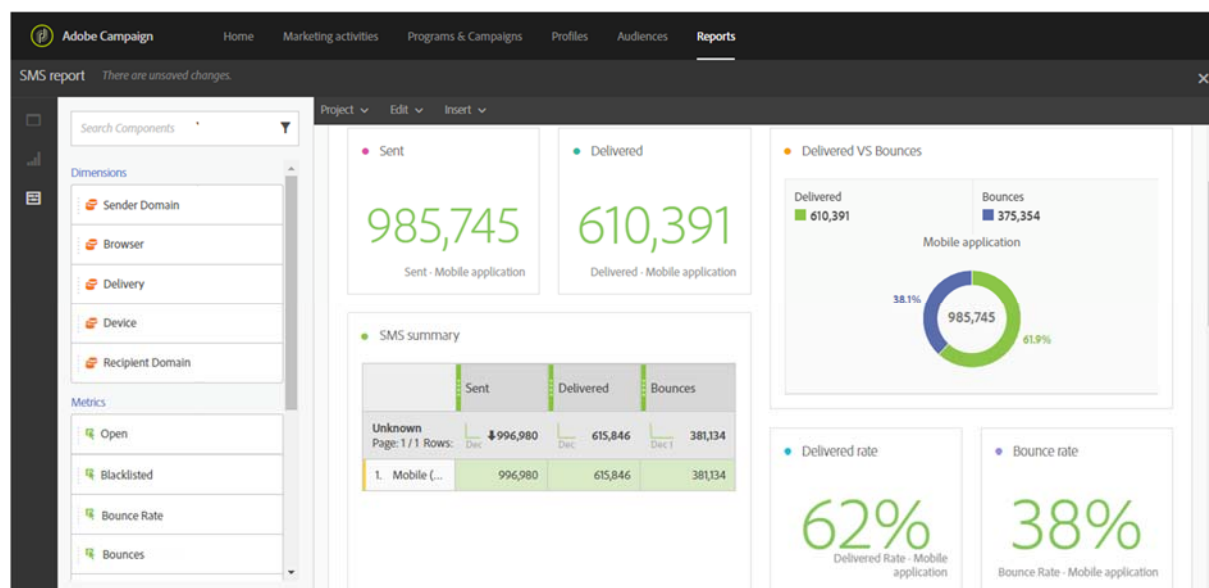


Figure 12. Adobe Campaign provides the State with a powerful, cross-channel outreach platform

By providing comprehensive campaign and personalization management capabilities, Adobe Experience Manager and Adobe Campaign can help the State plan, automate, measure, and optimize citizen outreach. Using our platform, the State can easily integrate e-mails into your outreach initiatives, e-mail templates and landing pages that are authored in Experience Manager. Adobe Campaign includes the following features that can help the State create an effective outreach program:





- *Integrated Customer Profiles:* Bring all the information you have about a customer - both online and offline - together in one place. That way, you can build truly personalized messages that get noticed
- *Cross-Channel Campaign Orchestration:* Marketers now have an intuitive way to design, execute, and manage customer experiences across channels. Using simple drag & drop icons, you can easily control your marketing content, channels, scheduling, budgeting, and resources. And then watch results in real time.
- *Contextual E-mail Outreach:* E-mail marketers still struggle with streamlining data, automating multiple touchpoints, and connecting e-mail with other digital channels. Adobe Campaign reinvents e-mail marketing by allowing businesses to deliver more effective, contextual, and integrated campaigns
- *Real-time Interaction Management:* Marketers often maintain hundreds of promotional offers. With Adobe Campaign, a centralized recommendation engine automates the process of selecting personalized, relevant offers and delivers them across channels — in real-time.
- *Salesforce Integration:* A Salesforce.com CRM connector for linking your Adobe Campaign platform to your Salesforce.com CRM environment. The connector enables synchronization of contacts, accounts, purchases, etc.

B. Principal Improved Benefits

There are principal benefits that ETS desires from its portal services and program:

- a) Support for a scalable IT environment and alignment with business needs;**
- b) Improved accountability and interaction between project teams in support of strategic initiatives;**
- c) Improved quality of delivered portal services and client satisfaction;**
- d) Matured service management capabilities aligned with best practices;**
- e) Establishment of a strategic enterprise approach to portal service management and supporting enterprise tooling platform;**
- f) Development of a repository with the ability to reuse code for projects with similar functions;**
- g) Process efficiency and productivity;**
- h) Greater cost savings, improved State revenue, and the ability to calculate Return on Investment (ROI);**



- i) **Accurate tracking and reporting of payment processing costs and fees for portal transactions;**
- j) **Decreases in cycle times for critical activities, especially enhancement development and changes to the portal;**
- k) **Improvements in ease-of-use and less complicated processes; and**
- l) **Ability to track and establish where these benefits will be coming from and to maintain a running estimate of the potential benefits of the program as it proceeds.**

Pacxa/Adobe Response:

Scalable IT Solutions

Pacxa has implemented Adobe and many large systems for State and Local Government departments. The solutions were designed and deployed using best practices for scalability while maintaining security compliance. The solutions have been deployed within State-maintained datacenters as well as at local commercial datacenters.

Pacxa has strong partnerships with many of the leading technology hardware and software vendors including the local commercial datacenters. Those partnerships have resulted in improved system designs for high availability, state and federal compliance and vendor responsiveness.

Organization

Pacxa has a solid track record of successful projects and satisfied customers. Pacxa's consulting workforce has extensive technical knowledge that translates to more efficient service and, therefore, cost savings.

Pacxa is very familiar with the State's IT systems and network infrastructure--our consultants work closely with ETS and other departments in support of many State systems. We are familiar with staff, systems, operations, as well as the State's larger strategic vision. Pacxa's workforce is local which provides long term consistency and continuity of system knowledge. We are local and understand how to do business in Hawai'i, working side-by-side with our customers to establish relationships based on mutual trust and respect, and developing productive working environments.

Project Methodology

Pacxa has been able to complete projects successfully is because of our proven project methodology. At project inception we develop project organization charts, define roles and responsibilities, develop communication plans and layout the process for change management.

Project Organization Chart

Resources selected for each engagement are handpicked to meet the needs of the client. Our project teams include multiple resources in key skill areas to mitigate resource availability risks.



Roles and Responsibilities

The table below demonstrates how our project team resources align and work with the client's staff.

Offeror		Client	
Roles & Key Resources	Responsibilities	Roles	Responsibilities
Executive Sponsor and Senior Vice President	Address any escalated issues or decisions if necessary.	Director of IT	Address any escalated issues or decisions if necessary.
Project Manager (PM)	<p>Work with and take direction from the client;</p> <p>Serve as primary point of contact;</p> <p>Work with the client to develop Statements of Work (SOWs);</p> <p>Work with the client to create a Communication plan;</p> <p>Coordinate and manage projects within the State's PIMS;</p> <p>Provide regular status reports;</p> <p>Ensure Contractor team members (CTM) are available;</p> <p>Ensure correct balance of on-site and off-site CTM are working on SOWs;</p>	Officer-in-Charge (OIC)	<p>Work with the PM to develop SOWs to provide infrastructure consulting and support services;</p> <p>Approve all SOW plans, schedules and deliverables.</p>



Offeror		Client	
Roles & Key Resources	Responsibilities	Roles	Responsibilities
	Schedule and plan all work in coordination with OIC or designees.		
Business Analyst	Determine customer requirements, resources required, and customer return on investment.	IT Analyst and Users	Provide information and access as required.
Change Manager	Provide readiness, process improvement guidance, and customer communications.	Key Stakeholders	Provide information and access as required; coordinate communications.
Technology Architect	Provide infrastructure strategic planning, tactical planning and project planning.	Officer-in-Charge (OIC)	Provide information and access as required.
System Administrator	Provide infrastructure support and consulting as defined in SOWs.	System Administrator	Provide information and access as required; participate in knowledge transfer activities.
Database Administrator	Provide infrastructure support and consulting as defined in SOWs.	Database Administrator or Production Support Staff	Provide information and access as required; participate in knowledge transfer activities.
Network Administrator	Provide infrastructure support and consulting as defined in SOWs.	Network Administrator	Provide information and access as required; participate in knowledge transfer activities.
Security Architect	Provide infrastructure support and consulting as defined in SOWs.	Network Administrator	Provide information and access as required; participate in knowledge transfer activities.

Table 1: Offeror Roles and Responsibilities



Communication Plan

Effective communication is the key for any project and allows the team to function efficiently. Project team members need to understand their roles and responsibilities in the project in order to successfully execute the scope of work. A solid communication plan provides an organized and planned approach to the delivery of key communications throughout the project. The plan will clearly assign responsibility and outline the schedule of the communication to key audiences and identify the most effective communication method.

Communication Methods

At Pacxa we have found that it is important to offer data in multiple formats for the duration of the project so that each stakeholder can access the information they need in the format they prefer. In addition, we integrate a variety of communication methods, styles, and timing to ensure that everyone can access the information when they need it.

Communication Goals

These are typical project communication goals:

1. Communicate effectively and in a timely manner.
2. Use the most appropriate and efficient communication method available that reaches stakeholders and team members most effectively.
3. Ensure project team members, stakeholders and sponsors clearly understand their role, responsibilities, assignments, deadlines and schedules.
4. Provide status updates as needed to all levels within the client as determined at the start of the project.

Pacxa’s communication plan/matrices typically contain the following items:

- Specific Delivery Date(s)
- Type of Communication (FAQ, program update, project status reports, etc.)
- Distribution/Target Audience: Who are the Stakeholder Group(s) (Staff, Public, etc.)
- Description Purpose: What is the purpose?
- Frequency (daily, weekly, monthly, quarterly, as needed or as identified, etc.) – when the information is communicated
- Owner/Contributor (who is responsible to develop content)
- Sender (who is responsible to deliver/send the communication)
- Distribution Type (memo, newsletter, email, website, town hall, staff meeting, press release, presentation, etc.) – how is the information distributed. Refer to chart below.

Distribution Type	Description
E-mail	Allows project teams to communicate text, audio, and video files between the team members



Distribution Type	Description
Interoffice memos	Provides a formal forum to communicate key dates, policies, and procedures
Instant Messaging (IM)	Allows team members to communicate real-time
Project status meetings	Provides regular status updates and reviews of the project
Telephone/video conferences	Provides a medium to involve team members located in other geographic regions
Intranet, Internet boards	Formally communicates status, progress, highlights, and objectives to all
Project road show	Provides feedback to stakeholders or users
Walk-about	Involves a hands-on face-to-face approach with your team and clients

Table 2: Communication Examples

The chart below is a sample of the various meetings that maybe held for a project.

Table 3: Meeting Schedule Examples

Meeting	Description Purpose	Frequency	Owner	Internal/ External	Comments/ Participants
Project Team Status Meeting	Communication of project progress and deliverable status.	Weekly	Project Lead	Internal	Client and Vendor
Management Status Meeting	Touch-base meeting to ensure project is operating smoothly. Ensure meeting the requirements of the SOW.	Weekly	Contract Lead and OIC	Internal	Client and Vendor
Steering Committee Meeting	Update on overall project status and discuss/address any issues or risks.	Monthly or as needed	Contract Lead and OIC	Internal	Client and Vendor
Change Control Board Meeting	Review and approve any required changes to the project SOW.	Monthly or as needed	Contract Lead and OIC	Internal	Client and Vendor



C. Key Program Effectiveness Measures

The program benefits measurement approach requires a number of leading indicators to provide assurance that the program is on-track to deliver targeted benefits. The measurement of benefits can be focused on many different areas, such as:

- a) Quality of Service Improvement;
- b) Efficiency and Productivity benefits; and
- c) Operational Risk Reduction benefits.

Key metrics will be identified and reported in each of these key areas to help articulate the recognition of benefits as well as the achievement of key milestones.

The table below lists examples of key metrics that can be mapped back to the different types of benefits listed above.

Benefit Area	Key Metric Example	Rationale
Quality of Service	A measured decrease in time to restore Critical IT services	Comparison of resolution times from the problem and change ticketing systems before, during and after the process optimization.
	Compliance to Service Level Objectives/Agreements	Measured improvement against a baseline conducted at the start of the project or continued compliance with agreed upon service level agreements.
	Decreased time spent for planned outages and maintenance windows.	Greater availability for key IT Services.
Efficiency and Productivity	Reduction in the length of time required to successfully implement a change	A faster cycle time by type change. This can be leveraged to demonstrate over time periods that IT is handling higher volumes of change activity more accurately with faster cycle times (often with the same or less staff).
	Reduction in the number	Increased manageability and predictability for proactive



	of unplanned and emergency changes	changes vs. unanticipated changes that could impact quality of service.
Operational Risk Reduction	Reduced number of outstanding audit gaps from Change and Configuration Mgmt.	Reduction of open risks identified from internal/external audits to ensure proper compliance is in place.
	Increased correlation between incidents and changes	More linkage is being connected across the lifecycle by tracking the number of changes that cause issues and the number of issues that are permanently corrected by changes.
	Increased capture and visibility of incidents and changes that occur across IT	

Pacxa/Adobe Response: Pacxa has extensive experience performing Maintenance and Operations activities for large scale solutions. Pacxa has developed incident, release and configuration management methodologies that are effective in meeting solution Service Level Agreements.

Incident Management

An incident is defined as an unplanned interruption or a reduction in the quality of an information technology (IT) service or a failure of a configuration item (CI) that has not yet impacted an IT service. Incidents can include failures or degradation of services reported by users, technical staff, third-party suppliers and partners, or automated monitoring tools. Incident management is responsible for managing the lifecycle of all incidents.

The first goal of the Incident Management process is to restore normal service operation as quickly as possible and minimize the impact on business operations. Normal service operation is defined here as service operation established with the customer SLAs and within the broader ITIL and ISO 20000 environment. A resolution or work-around will be established by the Service Desk as quickly as possible in order to restore the service. Incidents that cannot be resolved quickly by the Service Desk will be escalated to Level 2 or Level 3 support as necessary. The following table describes the responsibilities of each support level:

ROLE	RESPONSIBILITIES
Tier 1 - Help Desk	Document all communication with the users of the system. Answer questions relating to procedures or functionality. Log and manage incidents reported by users. Communicate workarounds for known errors. Assign incidents to Tier 2 that the Help Desk cannot resolve.



	Forward User Access Requests to Support. Send out Notifications to all users for system-wide events such as maintenance or updates.
Tier 2/3 - Help Desk	Functional Subject Matter Experts (SMEs), Development SMEs, and Operations SMEs provide research, analysis and answers for complex questions, assign tickets to SMEs and create defects if required.

Tools

Pacxa has experience with many leading ITIL Incident Management systems. An incident management system should record, categorize, prioritize, assign, escalate, and manage incidents from creation through resolution and reporting. Incident Management systems should also provide interfaces to other processes, such as Problem Management, Change Management, and Knowledge Management to assist incident resolution and prevention.

The following table summarizes key incident management activities.

ACTIVITY	DESCRIPTION
Incident Identification and Classification	<ul style="list-style-type: none"> • Gather information to facilitate service disruption analysis and assignment. • Redirect improperly routed service requests to the request fulfillment process. • Associate the incident with a relevant SLA. • Determine the incident priority. • Invoke the major incident procedure, where applicable.
Initial Support	<ul style="list-style-type: none"> • Match the incident against other related calls, events, incidents, known errors, or changes that are open or recently closed. • Escalate to second level support, if necessary. • In many cases, correspond workarounds, known errors, or quick fixes documented in the knowledge base allow incidents to be resolved at first level support without recourse to further resources.
Investigation and Diagnosis	<ul style="list-style-type: none"> • Perform full investigation and diagnosis of the assigned incident. • Provide advice on possible workarounds or temporary fixes. • Use standard operational procedures and work instructions to ensure that service can be restored as quickly as possible.
Resolution and Recovery	<ul style="list-style-type: none"> • Repair or replacing the faulty CI(s). • Restore the service so that it is available for use. • Submit an RFC when a change is necessary to achieve incident resolution. • Inform the customers and users that the service is restored. • Verify with the customer or callers that service restoration is satisfactory.



ACTIVITY	DESCRIPTION
Incident Closure	<ul style="list-style-type: none"> As far as practicable, confirmation that the service is truly restored should be obtained from the affected caller(s) before the incident is closed.

Release Management

Release Management supports the client’s needs for large, critical, or major rollouts of software and hardware. It applies to bundling related sets of changes into more efficient and less disruptive scheduled releases. We take a holistic view of such rollouts and changes to manage all technical and non-technical aspects of the client’s release from a single point of control. Application software releases are promoted through the pre-Production environments to production and disaster recovery environments. Hardware and O/S releases are achieved through best practice hardening processes that apply and test the appropriate patches.

Configuration Management

Configuration Management Services facilitate centralized management, with the goal of managing the client’s Service Assets and configuration items in order to support other processes on the platform. Configuration Management Services help to define application and infrastructure components to maintain accurate configuration records.

Our ITIL-aligned method includes designing, planning, building, and maintaining the physical and logical configuration specifications of the client’s IT assets. The client uses a management system to facilitate the integration and automation of the configuration management process. This results in stable service delivery and provides a foundation for current and future capacity planning and management of configuration items.

D. Users

The scope of this solution will cover all State and county departments and public users of the portal.

Pacxa/Adobe Response: Acknowledged.

E. Management

The State seeks to establish an automated portfolio, program, and project governance and management structure via a Project Management Information System (“PMIS”) that combines templates, workflows, configurations, etc. that will enable portfolio, program, and project managers to record, analyze, and track the information relating to the status and progress of their projects, and which will serve as a model for newly-established projects and





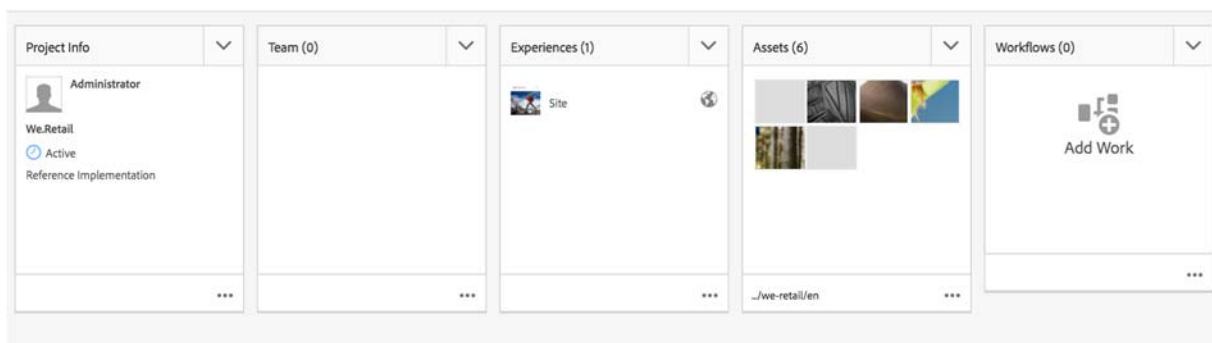
programs. Best practices, standards and modern tools should be incorporated into a PMIS. Additionally, the PMIS would allow for multiple project methodologies to be utilized within the same platform. A PMIS solution would include the following:

- a) Portfolio Management – multi-dimensional analysis of programs and projects across the enterprise;
- b) Program Management – aggregation of a set of related projects;
- c) Project Management (Waterfall Methodology) – cost, schedule, performance, scope, risk;
- d) Dashboards – “live” data extracted from PMIS and presented in a variety of ways to managers and executives, with customization and drill-down capabilities;
- e) Bug Resolution Logs and Tracking System;
- f) Help Desk Functionality; and
- g) Requirements Tracking.

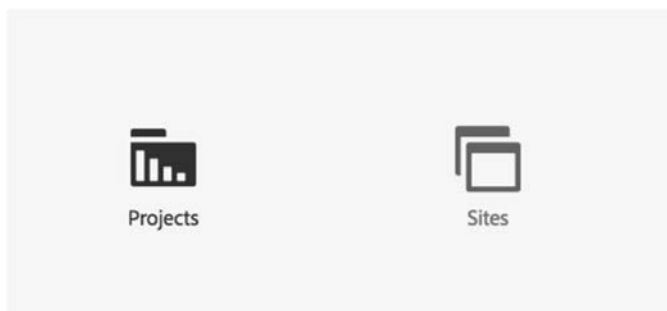
Respondents should provide the State with information about the extent to which a new Internet portal could be subject to this type of PMIS.

Pacxa/Adobe Response: There are many commercial PMIS systems on the market, each with various strengths and weaknesses. A fair number would likely work very well for the State of Hawai'i. From a portal perspective, it is important that the portal platform support multiple, concurrent projects at the same time. While Adobe Experience does not provide PMIS capability, it does allow for the creation of “projects” that could then be tracked and managed within the PMIS.

An example of this is depicted below, where a website (i.e. portal) is defined, team members associated with building the site are identified and given roles and access capability, experiences are created (i.e. mobile website, desktop website, mobile app), all digital assets required are consolidated in a single location, and workflows are created to manage approvals and other functions required in the creation and management of each portal.



Various projects should also map to a sites development capability, which should have the ability to build and support an enterprise grade personalized web site.



F. Social Media

The State is planning to add on software that will seamlessly integrate with it and SharePoint, and provide a layer of social media and network collaboration. Products such as Yammer, Mango and other similar ones can be used to overlay tools that lend themselves for the development of maximum engagement from stakeholders. Respondents should provide the State with information about the extent to which a new Internet portal could integrate this type of software.

Pacxa/Adobe Response: The State of Hawai'i is interested in "overlaying" tools that will facilitate collaboration among stakeholders in terms of ongoing portal activities. While Adobe Experience Manager does not integrate out of the box with the mentioned social collaboration tools (i.e. Yammer and Mango), our platform is built on a foundation of open-sourced components, including its Java Content Repository (JCR), and custom services can be developed that would invoke an API on a social collaboration app when content is changed or published. Regardless, AEM provides a powerful set of collaboration tools that can facilitate engagement from Hawaii.gov stakeholders.

Whether the stakeholders work across the hall or across the state, Adobe makes it easy to collaborate. Our platform provides the ability to store content and communications in one place so it's easy for everyone to find what they need. Our solutions provide the ability to monitor projects with personalized feeds and notifications and to quickly share reports and feedback with colleagues.

Our AEM Sites collaboration tools provide the following key collaboration features:

- *Personalized Feeds* - See status updates on any report, asset, or discussion you choose to follow every time you log in to Adobe Experience Cloud
- *Notifications* - Get alerts about activity on your projects so you can stay up-to-date and collaborate more effectively
- *Content Sharing* - Share reports, assets, feedback, and updates with colleagues directly from Experience Cloud



Additionally, AEM can be integrated with SharePoint to facilitate writing files and folders to the SharePoint document libraries, executing queries on the SharePoint system and displaying SharePoint images and videos as well as synchronizing SharePoint with the AEM Digital Asset Management (DAM) repository. Custom services could be developed to extend this integration in a way that would involve both AEM and SharePoint in the social, collaborative process.

G. Additional Management Objectives for the Portal

The State would like to work with an Internet portal services provider that supports a streamlined and efficient portal and State information technology organization that manages the portal by:

- a) Moving to a unified model that (i) works for all State and county websites and services, instead of the current model that uses multiple technologies and applications, (ii) will provide visibility into status of projects across the organization, (iii) will help to improve vendor /client relationships, (iv) will identify service delivery challenges quickly, and (v) will provide information about portal problems through improved reporting;
- b) Subcontracting with a payment processor that will be able to handle portal transactions in accordance with State-approved performance standards and provide clear documentation of all transactions on demand;
- c) Ensuring that changes to the portal are evaluated, documented, analyzed, communicated and approved in advance of implementation, according to a consistent, repeatable and documented process;
- d) Monitoring all active and proposed portal related projects within a single overall framework; and
- e) Providing a consolidated view of key portal service management information for leadership decision-making activities.

Respondents should provide the State with information about the extent to which a new Internet portal could meet these requirements.

Pacxa/Adobe Response:

As noted in Section “B”, Pacxa’s project methodology, Communications and Change Management play an important role in a successful project. By adhering to best practices for





Communications and Change Management, our clients will always have visibility into all aspects of the project.

Status Reporting

Pacxa will submit on a bi-weekly or weekly basis as agreed upon by the client a status report outlining tasks completed per the Statement of Work and upcoming work for the next reporting period. The contents of the status report will be agreed upon with the client and Pacxa.

Pacxa feels that this is the best process to follow to ensure that there are minimal surprises on the project and ensure the project's success.

Change Management

Effective Change Management delivers efficient, prompt handling of IT modifications, while maximizing service stability. Change Management is not merely an implementation of new techniques to address a changing business environment, but rather a discipline that manages change systematically, reliably, and rigorously. Our approach will be to consolidate change management into a single process and system for our clients, providing an enterprise-wide approach to manage technology change. We will integrate our change management processes and procedures with our client's existing processes wherever appropriate. Our technology-driven change management services will produce the following results:

- Defined and consistent Change Management processes and procedures approved by the client's PMO that can be flowed down to all sub-projects and suppliers
- Stability and minimal disruptions to employees and customers
- Changes implemented according to a mutually agreed-on schedule
- Minimized black outs, system outages, and rework caused by ineffective change planning, testing, or implementation

The goal of Change Management is to enable beneficial changes with minimal disruption to IT services. It will help ensure that changes are deployed in a controlled way, such that they are evaluated, prioritized, planned, tested, implemented, and documented.

H. Development and Configuration

As with any technology project, the software for the Internet portal could be custom developed or commercially available and configurable software, or a combination of the two. The State would like to receive information on the extent to which each of these models applies in the Internet portal market and the time required to design, develop, implement and maintain each approach. For example, in a custom developed model, how many hours would be required of the vendor's staff for this work, e.g., Project Manager – 20 hours, Developer – 60 hours, etc.? For a configurable system, how many hours would be required for configuring the software, testing it, and implementing it?





Pacxa/Adobe Response: The project cadence established by Pacxa includes formal and ad hoc approaches to inform and align key stakeholders as summarized below:

- The methodology facilitates information flow across the entire project, including project status, key accomplishments, Issues, Risks, Decisions, and Action Items, with all key stakeholders. We conduct Daily Stand-up meetings with the technical team. We arrange for facilitated reviews, as required, of key deliverables, such as Project Charter, Test Plan, etc. We also do Demonstrations as features are completed or milestones reached, when appropriate.
- The tools include e-mail, meetings, and online/offline collaboration systems

Delivery and execution time usually entails the following percentages of time:

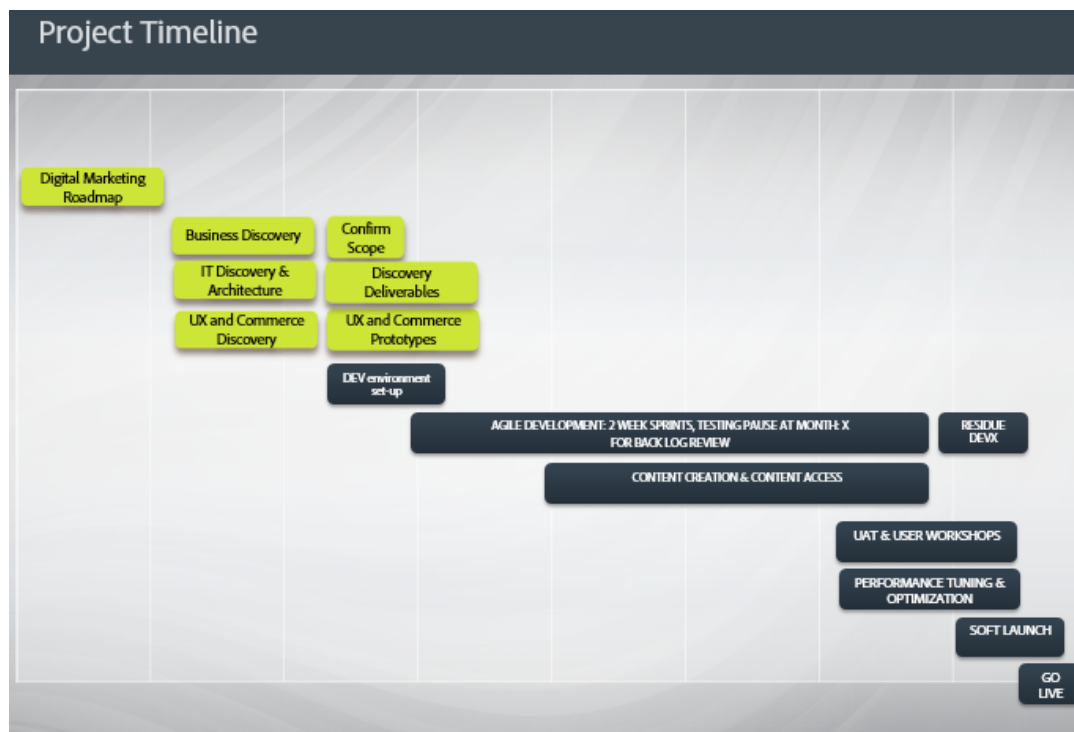
- Design - 20%
- Develop - 50%
- Implement - 20%
- Maintain - 10%

The exact percentages can vary based on the extent to which (a) how many design and prototype cycles and revisions are made, (b) how much custom code is required, (c) the extent to which the Adobe team orchestrates the non-Adobe platform elements of the go live, such as content preparation, migration, and validation, and (d) the support model expected to follow the main implementation.

The actual timeline and duration of the engagement/s varies depending on the upgrade migration strategy the State wants to adopt. For example,

- A “Phase One” improvement through personalization and analytics (that would provide valuable metrics to gauge the extent and scope of any additional phases) is typically 3-6 months
- A complete re-platform, re-skin to AEM, and full migration of content and applications would probably fall in the range of 6 to 16 months

Sample phases and deliverables for an enterprise deployment of our Experience Cloud platform is provided below.



Adobe Experience Manager Sites comes with several pre-defined templates and components, the extent to which such OOTB functionality would require simple configuration or custom development is contingent on the features required and typically finalized during a detailed Discovery session which can result in a phased out approach.

The other components of the Adobe Experience Cloud platform (Adobe Analytics, Adobe Target and Adobe Campaign) are deployed in similar fashion and are also offered a la carte with a variety of pre-defined scope SKUs that range from a basic configuration to completely customized, integrated solutions.

The average deployment time for the Adobe Experience Manager platform ranges between 3 to 9 months and timelines are subject to validation of scope and alignment with the State's deadlines and objectives.

The execution and development our deployment methodology is usually organized as follows, but can be tailored to meet the State's specific practices and needs.

- Project Managers will set up a project e-mail list for use by all participants and separate lists for each component and group. All project communication is required to take place on this list or in the communication channel and task tracking tools described below.
- A weekly meeting will be conducted online. Unless previously excused, at least one representative from Adobe, preferably the team lead, is required to participate. By 5



p.m. on the day prior to this meeting, Adobe will submit an e-mail report to the project mailing list describing the tasks accomplished in the previous sprint, tasks to be completed in the upcoming sprint and any roadblocks or questions they have encountered that block their progress.

- Agile/Scrum Development (3-Week Sprints) sprint planning and review. The project is usually divided into 3-week sprints, sometimes these can be 2-week sprints depending on specific customer requirements and timeline constraints. Each 3rd weekly meeting will be used to review work completed in the previous sprint and plan tasks for the upcoming sprint. Priorities will be reviewed and revised at each of these meetings.
- An online instance of JIRA or equivalent (provided by the State) will be used to track project tasks. Adobe will use this tool to break down high-level requirements into manageable tasks and track their progress on a daily basis. Project Managers will use this tool to follow progress and to comment on progress during the course of the project.

I. Licensing and Ownership

There are also choices regarding ownership or licensing of the underlying software and other technology that would be used for the Internet portal. Normally, the State would want to own newly developed software, and it would want to structure licenses for the portal that would be appropriate for the services. However, the State might be willing to forego ownership of the newly developed software in return for some other type of consideration.

The State would like information about these different models for Internet portals, including whether it is normal for a customer like the State to own the underlying portal software or how licenses are structured for software that would be owned by the portal vendor, such as regarding volumes of users, transactions and other measures.

Pacxa/Adobe Response: Software license ownership generally resides with the manufacturer. Customers are granted a license to use the software. However, all content will belong to the State.

Adobe Experience Cloud is a digital marketing platform comprised of several components purchased individually or as a platform. Our products run on-premise and/or in the cloud. The cloud could be a hybrid model of running at the State of Hawai'i's data center and managed by Pacxa. For a statewide re-platform, we would recommend licensing the following products by department, incrementally as product maturity grows with our tools:

- Adobe Experience Manager Sites includes Assets for portal & web content
- Up to 10 users per department



- Adobe Analytics up to 1 million hits per year

After a period of maturity with Adobe products, we would recommend adding the following components of the platform:

- Adobe Campaign for e-mail and SMS personalized content, up to 1 million per year
- Adobe Livefyre for social listening, measurement, and allowing the citizens of Hawai'i to share user-generated content with a built-in audit trail for copyright protection
- Adobe Target & Adobe Audience Manager for customizing segments of content specific to user population

Upon approval from Adobe, software can be licensed in three ways:

- No fees paid for up to 12 months until deliverables are met, then licenses would be transferred to State of Hawai'i
- Annual subscription fees for software and support bundled, paid once annually for a period of 12 months with rights to renew if mutually agreed upon
- Annual perpetual licenses - larger fee paid upfront with support paid in subsequent years if mutually agreed upon
- Purchase entire platform up front for the entire State of Hawai'i, annual renewal if mutually agreed upon

Adobe's licensing model allows State of Hawai'i to own content, configurations, and custom code.

J. Financial Matters

As described above, this Internet portal is self-funded, which means that the revenue received by the State from the public's use of the portal pays for its development and operational costs, and the vendor receives as its fees a percentage of revenue from different services provided on the portal. Costs for the design, development and implementation of a custom-built system would normally be paid for based on acceptance of key deliverables, and operational and maintenance fees paid for on a fixed, monthly fee basis. Or, these fees could all be paid for after acceptance of the new system through the fixed, monthly fees or based on a percentage of fees received by the State from the portal services.

The State would like information about the extent to which each of these different kinds of financial models is used for Internet portals.



Pacxa/Adobe Response: As ETS has identified, there are various financial models in use. The selection of a financial model will largely depend on how the State envisions and values a return on investment. We are open to further discussions on this.



4.0 Answers to Specific Questions for Respondents

The State requests that respondents answer the following questions in their responses to this RFI:

- a) **From your past experience, has the State identified all the major components necessary to pursue an RFP for a new Internet portal provider? If not, please provide information on other necessary components.**

Pacxa/Adobe Response: For the State's Internet Portal initiative, the major components have been stated in such a way that the full scope and nature of the portal needs more definition. It is not precisely clear who the portal is serving for each component and the component-level expectation of adoption at scale. Also, it is not clear which components the State expects to be utilized by the provider as part of providing a portal service or if the State plans on procuring and directly utilizing such functionality (i.e. does the State plan on acquiring and utilizing an ITSM tool [such as Remedy or ServiceNow] or is the State looking for a portal provider that would offer such frameworks and tools in delivering portal services?).

- b) **Are there potential problems and risks that the State may encounter during this project?**

Pacxa/Adobe Response: The State has several options for addressing the current internet portal's needs. It is unclear if the State can utilize the existing portal and improve upon it (note, this would require having access to, license, and/or ownership of the portal code) or must create a new portal (i.e. rewrite of portal). This should be completely understood in determining a path forward.

If the State can utilize the existing portal technology and improve upon it, there are several approaches that can be taken which provide a solid basis on whether to tweak the existing portal and add personalization capability or to fundamentally change the citizen experience with the portal and associated portal services.

- c) **Based on your review of the requirements described, can you describe the strengths, weaknesses, opportunities and threats associated with a solution(s) you suggest?**

Pacxa/Adobe Response: We would take an approach that leverages the current investment you have today and then determine specifically how to utilize the existing portal or pursue development of a new portal. This would be based on specific KPI's



provided by or developed together with the State and determining how to best meet those objectives.

- d) Can you provide a preliminary plan and timeline on how the existing services could be migrated to a new vendor without interrupting services?**

Pacxa/Adobe Response: It is unclear whether this question refers to porting the State's existing portal to another technology infrastructure provider who would maintain the portal and associated service operations or if this also refers to developing a new portal and migrating to the new portal without service disruption to citizens. These are drastically different approaches that require very different plans and timelines. This would need to be clarified prior developing a plan and timeline.

- e) Can you provide any ideas or suggestions about how such problems and risks should be addressed in an RFP for Internet portal services?**

Pacxa/Adobe Response: The risks from (b) can be best elaborated and controlled by a collaborative process which entails the cross-functional team reviewing each element of the project, prioritizing the risks, and agreeing on mitigation strategies. Adobe includes this approach in all our professional services engagements of this size and scope, including, for example, a monthly executive steering committee meeting to ensure issues and risks are transparently shared and collaboratively addressed.

- f) In order to determine the feasibility of developing a new Internet portal solution, can you provide a "ball park" cost estimate associated with the proposed solution(s) identified in your response, including start-up costs, implementation costs, maintenance, etc.? The information will be used for planning purposes only and should not be construed as part of any future RFP solicitation.**

Pacxa/Adobe Response: It is unclear whether this question refers to porting the existing portal capabilities to another technology infrastructure provider who would maintain the portal and associated service operations, or if this also refers to developing a new portal and migrating to the new portal without service disruption to citizens. These are drastically different approaches that require very different plans and timelines. This would need to be clarified prior developing a ball park estimate.

- g) As an alternative to using or relying on just one vendor for the solution, are there possible solutions using a combination of vendors, where the State would interface with a main vendor and the others would be subcontractors or independent contractors? If so, please describe.**

Pacxa/Adobe Response: It is highly unlikely that a single vendor will meet the



articulated needs of the State so we believe that several vendors working as a team will be required. For example, the following types of vendors would comprise the team:

1. Lead integrator defining business processes, KPIs, etc., and determining ongoing staffing as needed to run both the portal and associated portal services;
2. Software platform with capabilities to provide a personalized, highly-usable and intuitive digital experience that is effective on whatever device a citizen desires (mobile, tablet, desktop) and provide citizen outreach capability through digital campaigns; and
3. Technology infrastructure provider and/or managed services provider. There is a high likelihood that the various cloud providers (i.e. Microsoft Azure, Amazon Web Services) can be utilized in some fashion and typically there is a managed service or 3rd party managing those efforts.

h) Do you have any additional comments/information that you feel would be beneficial to the State in deciding on a solution for the services outlined in this RFI?

Pacxa/Adobe Response: Yes. Citizens are more and more expecting the same types of digital experiences they experience in day-to-day life with the private sector as they do with their state government. They essentially expect to be marketed to and serviced with an ongoing dialogue, collaboration, and some form of community discussion (i.e. citizens posting and sharing questions)--all of this in addition to the portal-like capability that provides the content needed.