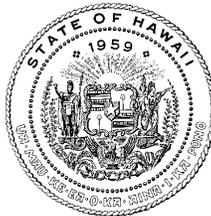




**REQUEST FOR PROPOSALS
FOR 2018-2019 SIGNATURE EVENTS on O‘AHU’S LEEWARD
COAST RESORT AREA**

HTA RFP NO. 18-16



Hawai'i Tourism Authority
State of Hawai'i
1801 Kalākaua Avenue
Hawai'i Convention Center, First Level
Honolulu, Hawai'i 96815

Date of Issuance: March 21, 2018

Procurement Officer/Contract Manager:
Mr. Ronald D. Rodriguez

DEADLINE FOR RECEIPT OF PROPOSALS IS
Wednesday, May 2, 2018, 4:30 p.m. HST
See Proposal Outline for Submission Requirements

**REQUEST FOR PROPOSAL
FOR THE 2018
HAWAII TOURISM AUTHORITY
COMMUNITY ENRICHMENT PROGRAM (CEP)
HTA RFP NO. 18-16**

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I. OVERVIEW AND TIMELINE

RFP Overview

The Hawai'i Tourism Authority's (HTA) is issuing this Request for Proposals ("RFP") seeking world-class Signature Events for O'ahu's leeward coast. Interested parties must submit a proposal as described in the Proposal Outline section of this RFP. The successful applicant shall be an independent contractor and shall furnish all management, supervision, labor, and any or all other services, as required by the HTA.

Potential applicants are strongly encouraged to sign up for updates to this RFP at <https://htacontracts.wufoo.com/forms/zdombje158w1vo/>. Those who fill out the online interest form by the due date will receive notice of changes and addendums directly to their email.

Procurement Timeline

The following Procurement Timetable presents a best estimate of when each phase of the process will be completed. Dates are subject to change. All dates and times are in Hawai'i Standard Time Zone.

Request for Proposal (RFP) Activities	SCHEDULED DATE Subject to Change
Distribution of RFP	March 21, 2018
Deadline for Submitting Online Interest Form	March 29, 2018
Deadline for written questions to HTA (by 4:30 pm HST)	March 29, 2018
Responses to Written Questions – Addendum 1	Week of April 2, 2018
Deadline for Protest of Content to RFP	Within 5 calendar days of Addendum 1
Deadline for written proposal submissions (by 4:30 pm HST)	Wednesday, May 2, 2018
Invitations to Oral Interviews	May 11, 2018
Oral Interviews	Week of May 14, 2018
Notice of Selection or Non-selection	Week of May 14, 2018
Contract Activities	Scheduled Date (subject to Change)
Start of Initial Contract Period	June
End of Initial Contract Period	Varies

Delivery of the Submissions – Electronically Only (NO PAPER DOCUMENTS)

Your submission will consist of two (2) electronic documents in PDF format containing the below-listed items in the following order:

- Electronic Document 1:
 - Written Proposal (Maximum 25 Pages)
- Electronic Document 2: Forms and Attachments
 - Form A: Applicant Information Form (signed)
 - W9
 - CVC if available
 - Proof of Insurance if available
 - Form B: Itemized Budget
 - Form C: Budget Narrative
 - Form D: KPI Form
 - Form E: HTA Impact Worksheet

No paper submissions. No facsimile submissions.

Delivery of the Proposal Electronically Only (NO PAPER DOCUMENTS)

Each Applicant is required to deliver a proposal in electronic format to the Procurement Officer designated below, either via email attachment, via a downloadable link, or on a flash drive by the deadline listed in the Procurement Timeline. All emails must include the RFP number in the subject line. Any attached electronic file should be labelled to read: **“RFP 18-16 PDF [number] – [Name of Event]”**. Example: RFP 18-16 PDF 1 – Flower Day Parade. (See Section V for information on Forms.) Cover page of proposal should clearly state the RFP number, name of the Project or Event, and the Applicant name. All proposals are to be delivered as no more than two (2) electronic documents as described above.

The official time for receipt of the email shall be the date and time stamp automatically recorded on the email. Proposals downloadable through a link shall be available for download by HTA no later than the deadline listed in the Procurement Timeline—downloads unavailable at deadline will be considered late. Any flash drive containing a proposal shall be delivered to, and actually received by the HTA at the address below no later than the deadline listed in the Procurement Timeline. Paper submissions and facsimile submissions will not be accepted.

Procurement Officer

Applicants are to submit proposals to, and communicate with, only the Procurement Office for this RFP. Communication with other HTA staff regarding this RFP could be grounds for disqualification. HTA is not responsible for misinformation or reliance from other sources. Unless otherwise specified in a written Addendum to the RFP, the Procurement Officer for this RFP is:

Ronald D. Rodriguez
1801 Kalākaua Avenue
Hawai'i Convention Center, First Level
Honolulu, Hawai'i 96815

Email: contracting@gohta.net Phone: (808) 973-9449

Note to past applicants: The email address, contracting@gohta.net, is the only authorized email address for this RFP. Please do not use last year's email address for communication about or submission to this RFP.

Emails are encouraged over phone calls. Emails should ALWAYS include the RFP number in the subject line. The easier an email is to identify and sort, the quicker it will be answered.

Confirmation of Receipt

All applicants will receive an email confirming receipt of submission. However, those who submit on the last day (after midnight the night of Tuesday, May 1) might not receive confirmation until after the deadline has already passed.

If you do not receive confirmation of receipt by Friday, May 4, please contact the procurement officer listed above.

RFP Questions

Any applicant having questions or requiring clarification or interpretation of any section of the RFP must pose these in a Word doc as an email attachment to contracting@gohta.net by the date specified in the timeline. Where available, please indicate the page and/or section number you are referring to in your question. The HTA will share answers via an Addendum to this RFP.

II. BACKGROUND INFORMATION, OBJECTIVES

A. **Hawai'i Tourism Authority.** HTA is a government agency established by the State of Hawai'i in 1998, pursuant to Chapter 201B of the Hawai'i Revised Statutes, to promote and market the State as a visitor destination. HTA is the lead agency and advocate for Hawai'i's tourism industry. Its mission is to strategically manage Hawai'i tourism in a sustainable manner consistent with economic goals, cultural values, preservation of natural resources, community desires and visitor industry needs.

B. **HTA Five-Year Strategic Plan and Emphasis on Hawaiian Culture**

The four goals of the HTA five-year strategic plan are:

1. Improve the integrity of the destination
2. Ensure stable economic benefits
3. Elevate Hawai'i's value perception
4. Strengthen HTA's reputation

Community-based tourism projects are an integral element in achieving these four goals.

The HTA's Five-Year Strategic Plan 2016 is available on our website

http://www.hawaiitourismauthority.org/default/assets/File/HTA15001-Strategic%20Plan_web.pdf.

C. **Signature Events (SE).** HTA's Signature Events are major festivals and events supported by the HTA which exemplify the unique Hawaii brand. The purpose of the Signature Events Program (hereinafter referred to as the "SEP"), is to allow the Hawai'i Tourism Authority ("HTA") to be proactive in exploring other new activities to keep visitor satisfaction levels elevated while providing prospects for economic development for Hawai'i's communities. In the highly competitive global destination environment, Hawai'i needs to continue to keep pace with the development of new products and attractions, and to support those activities which may not be addressed under other HTA programs. *Signature Events are designed to have a high level of TV, web, and print exposure in the major market areas, and significant economic impact as measured by the number of out-of-state participants.* The major market areas supported by the HTA are the United States, Japan, Canada, Oceania, China, Korea, Taiwan, Europe, Southeast Asia, and Hong Kong.

The HTA supports signature events that provide an experience that is unique and enriching, while valuing and perpetuating Hawai'i's natural resources, Hawaiian culture, and honoring its people and traditions. To provide a diverse and quality tourism product unique to Hawai'i, the signature events program also supports such events that celebrate its diverse multi-cultures and community. Signature events are strategically positioned during normally soft or shoulder periods (Spring or Fall) to attract visitors to travel during these times of the year. See our signature events page for links to festivals that have met the criteria:

<http://www.hawaiitourismauthority.org/programs/signature-events/>.

OBJECTIVES OF THIS SOLICITATION

To support and create world-class signature events on O'ahu's Leeward Coast resort area to attract visitors outside of the State to come to the area to attend or participate. Signature Events offer unique experiences and highlight Hawai'i's host culture. Signature Events also have high media value and exposure, in addition to bringing significant economic impact to the State. They also foster relationships between events and the visitor industry, in addition to the community.

III. APPLICANT AND PROJECT ELIGIBILITY

The HTA seeks proposals for projects that meet the proposal guidelines in this solicitation and that meet the following project eligibility requirements:

APPLICANT ELIGIBILITY

- A. **Eligible Applicants.** Applicant may be either a nonprofit organization, a for-profit organization, or a government agency; but in any case, must be a legal entity registered with the State of Hawai'i. In other words, you must have an official business license.
- B. **Non-allowable Expenses:** The following activities will **not** be funded:
- a. Business or organizational start-up plans;
 - b. Fundraising (an event to raise money for your organization or a specific cause);
 - c. Salaries;
 - d. Administrative costs, no more than 10% of award may be used towards;
 - e. Litigation efforts;
 - f. Endowments;
 - g. Real Property;
 - h. Capital improvements;
 - i. Conferences/Conventions;
 - j. Merchandising (HTA funds to purchase goods (e.g. T-shirts) which will be resold for a profit);
 - k. Computer equipment;
 - l. Projects receiving funding from other HTA programs for the year 2018, including, but not limited to, the Community Enrichment Program, Kūkulu Ola Program, Aloha 'Āina Program, and Signature Incubator Program;
 - m. Reimbursement for pre-award expenditures or costs before September 1, 2018.
- C. **Preferred Practices:** Many efforts tied to the future of Hawai'i's visitor industry call for encouraging sustainable practices that affect the "triple bottom line" – the economy, the community and the environment. These practices are strongly encouraged and recommended.
- a. **Environmental Sustainability.** The HTA would like to encourage applicants to consider incorporating and implementing "green" practices into your program and/or project. These practices could include, but are not limited to, efforts such as:
- 1. Increasing recycling efforts;
 - 2. Minimizing waste production;
 - 3. Buying local;
 - 4. Minimizing printing and limiting number of handouts;
 - 5. Using recycled products such as paper for printing;
 - 6. Using more environmentally friendly products or biodegradable products;
 - 7. Providing transportation alternatives such as car sharing or park and rides;
 - 8. Conserving water;
 - 9. Ensuring your venue has an environmental sustainability policy; and/or
 - 10. Incorporating energy efficient practices.

Please refer to the state of Hawai'i Department of Business, Economic Development & Tourism's ENERGY Office's Green Business Program: energy.hawaii.gov/green-events-checklist-examples.

- b. **Authentic & Accurate Representation.** As identified in HTA's Five-Year Strategic Plan, one of HTA's strategies is to "perpetuate and promote the uniqueness and integrity of the Native Hawaiian culture and community. As such, the HTA encourages applicants to use best efforts to follow the HTA "Style & Resource Guide." This document clarifies facts about the islands, providing guidance for the depiction of sites and culture, and sharing insights into promoting Hawai'i sensitively and safely, and lists cultural resources and reference materials. Relevant documents and resources are available at: <http://www.hawaiitourismauthority.org/programs/hawaiian-culture/maemae-program/>, with the Style & Resources Guide available at: <http://www.hawaiitourismauthority.org/default/assets/File/brand/StyleandResourceGuide.pdf>.

D. WARNING (Could Lead to State Rescinding Award):

- a. **Vendor Compliance – TIME SENSITIVE.** Applicant must have an active State Certificate of Vendor Compliance (CVC) before they can sign a contract with the State. All contracts must be executed by early June which means that the winning applicant must have a valid CVC by June 1 to avoid having their award rescinded.

START THE CVC APPLICATION PROCESS NOW! DO NOT WAIT! The process can be time-consuming, especially for entities who have never applied before. Visit <https://vendors.ehawaii.gov/hce/splash/welcome.html> and see Section IV of this RFP for more details.
- b. **Liability Insurance.** Certificate of Insurance is due at least three months prior to the event being contracted. Festivals and Events will be required to have commercial general liability insurance of at least \$1 Million per incident, \$2 Million in aggregate. Certificate must list either the Hawai'i Tourism Authority or the State of Hawai'i as an additional insured. If proof of insurance is not presented in a timely manner, the RFP award may be rescinded. See Section IV of this RFP for details.
- c. **Contract Deadline.** All contracts must be executed by June 2018. Contracts not signed, notarized, and fully executed by the end of June will be cancelled and the award rescinded. See Section IV of this RFP for details.

PROJECT ELIGIBILITY/SPECIFICATIONS

The HTA seeks proposals for projects that meet the proposal guidelines in this solicitation and the following project specifications:

- A. **Project Term.** This program is intended to support projects occurring from September 30, 2018 to December 31, 2019. Contracts must be executed by June 2018 to receive funding. See Section IV Contract Processing for details and deadlines.
- B. **Project Location.** Project or event must take place on the leeward coast of O'ahu, located in or easily accessible from the Ko Olina Resort area.
- C. **Award Limits.** To ensure support for multiple projects, applicants may request an award of no more than \$100,000.

- D. **Past Enrichment Program Contractor Compliance.** Entities that failed to meet the terms of an Agreement on any previous CEP, or CPEP, or Signature Event, or Signature Incubator award may not submit a Signature Events proposal until issues with the previous award have been resolved and the applicant receives written permission from the respective County executing the agreement.
- E. **Multiple Proposals to SE.** Multiple proposals from an organization for *different and separate projects* will be accepted and considered independently of each other.
- F. **Matching Funds Requirement.** A minimum of one-to-one (1:1) in matching funds to the amount of funds requested has been set. Matching funds can be in the form of cash or a combination of cash and in-kind contributions. If the match includes in-kind contributions, a **minimum of 50% of the match must be in the form of cash.** (Example: If you are awarded \$50,000, you must be able to show \$50,000 in matching funds. Of those \$50,000, at least \$25,000 must be in cash.)

Any contribution to the project other than cash is considered “in-kind” and would be considered as matching funds. This includes, among other things: volunteer hours, supplies, or services contributed to the project. A reasonable dollar value must be attached to the in-kind contribution. Please refer to the Research and Statistics Office of the Hawai‘i State Department of Labor and Industrial Relations for wage estimates by occupation.

Acceptable proof of matching funds includes, but is not limited to: a letter of commitment, a copy of a check, receipts of deposit, or a copy of an agreement between the applicant and another sponsor. A list of sponsors and/or in-kind contributions is not acceptable proof.

Applicants awarded funding will need to provide HTA with proof of 100% matching funds with 50% in cash.

- G. **Other Government Sources.** Money from other State government sources—including other HTA programs or the HTA’s major contractors such as, but not limited to, the Hawai‘i Visitors and Convention Bureau or its Island chapters—may not be counted towards matching funds. This limitation applies to State funds, and does not apply to local, county, or federal funds.

The limitation stated above does not prohibit you from accepting funds from State agencies; it only limits your ability to count those contributions towards your matching funds. Please feel free to get any support you can get from State sources.

- H. **Project Income.** If the proposed project generates revenue, project income may be used for one or more of the following: 1) unanticipated costs directly related to implementing the proposed project during the approved project period; 2) costs related to enhancing or expanding the effectiveness or reach of the project; or 3) ensuring the sustainability of the project.
- I. **Evaluation Committee and Review Process.** Proposals will be evaluated by a Committee whose members are selected by the HTA and include representatives of the HTA. All committee members may participate in decision-making on award recommendations provided they have no direct personal interest in the proposal in question. Proposals will be evaluated as detailed in Section V, Project Evaluation Criteria. **INCOMPLETE APPLICATIONS MAY NOT BE REVIEWED AND MAY BE DISQUALIFIED AS NONRESPONSIVE.**

- J. **Future RFP Schedules.** This is a specialized RFP. The HTA does not plan to issue an RFP especially for O'ahu's leeward coast resort area in the future.
- K. **Deadline for Submissions.** No proposal in response to this RFP shall be considered if electronically received after the due date and time as stated in the Procurement Timeline in Section I of this RFP.

IV. CONTRACTING PROCESS

Contract Execution in June. All contracts for this RFP must be signed, notarized, and fully executed by June 2018 to ensure fiscal year funding. Contracts not executed in time will not receive funding and the award will be rescinded.

- A. **State Vendor Compliance Certification – TIME SENSITIVE.** Contractor must have an active State Vendor Compliance Certificate to be contracted with, and paid by, the State. This certificate requires approval from four different agencies: the Department of Labor, the Department of Commerce and Consumer Affairs (DCCA), the Internal Revenue Service (IRS), and the Hawai'i Department of Taxation (DOTAX). All approvals can be acquired through one convenient location at Hawai'i Compliance Express. <https://vendors.ehawaii.gov/hce/splash/welcome.html>. There is a \$12 annual fee for this service.

START THE CVC APPLICATION PROCESS NOW! DO NOT WAIT! The process can be time-consuming, especially for entities who have never applied before. Contracts must be executed by June which means that you must have your valid CVC by June 1 to beat the deadline.

Awardees who fail to get a valid CVC in time to execute the contract in June will have their awards rescinded. No exceptions.

- B. **Liability Insurance – TIME SENSITIVE.** Festivals and Events will be required to have commercial general liability insurance of at least \$1 Million per incident, \$2 Million in aggregate. Policy must also list either the Hawai'i Tourism Authority or the State of Hawai'i as an additional insured. Contractor must have insurance at least three months prior to the event.

Lack of insurance will be a bar to payment. Awardees who fail to present a certificate of insurance by the start of the event will have their awards rescinded.

- C. **This is not a grant.** Awardees will be signing a contract. Contractor will not be paid based on receipts. Contractor will not be paid a lump sum. Contractor will be put on a payment schedule and each payment will have associated deliverables tied to it.

A "deliverable" is what the contractor must deliver to the HTA to get paid. Examples of possible deliverables may include but are not limited to progress reports, updated budgets, samples of advertising or media outreach, proof of matching funds, certificate of insurance, certificate of vendor compliance, and an invoice. We will create a checklist of deliverables for each payment. All deliverables must be received before a check will be cut. If we do not receive a deliverable on the list, you will not get paid.

The timing of your payment schedule will depend on your program. Please be aware that your award will be spread out over multiple payments. Also, per agency policy, the final payment cannot be less than 10% of the total award. (Example: if your award is for \$50,000, no less than \$5,000 of that will be held until the final payment.)

- D. **Ownership.** This is not a work for hire. Project/event being presented will remain the property of the applicant/contractor.

- E. **Updated Budget.** If the applicant is awarded less than what was requested in their RFP proposal, they will need to submit an updated budget showing how the money will be distributed before a contract can be executed.
- F. **Visual documentation.** Copies of all advertising and promotional materials and a minimum of ten (10) high resolution (minimum 300dpi) digital photographs, video (preferably in high definition (HD)) and/or other visual documentation submitted on a CD and/or DVD will be required as part of the final reporting requirements of this program. Images including, but not limited to, still photography and video, must come with appropriate release agreements to allow the use of these materials for promotional efforts by the HTA and/or approved contractors.
- G. **Publicity Article and Photo.** If funded, the grantee must provide an article and photo describing the project that is suitable for publication in the HTA newsletter, HTA's marketing contractors' newsletter or other news media. The article will be due four months before the start of your event or asap if event is within four months of contract execution.
- H. **Sponsorship Recognition.** The Hawai'i Tourism Authority shall be credited as a sponsor in all advertising and promotional materials and activities. In addition, the Experiences of Hawai'i logo, to be supplied by the STATE, must be used in all promotional and marketing collateral.
- I. **Promotional Programs.** Contractors under this program shall consult with the HTA's marketing contractors and staff to coordinate marketing efforts as appropriate to reach pre-arrival visitors, post-arrival visitors and residents. Contractors under this program may be selected to participate in HTA's "Hawai'i Knowledge Bank" program. Contractors under this program shall list any public events on the calendar of events for the HTA's marketing contractors via www.gohawaii.com and, to the extent possible, other available web sites, calendars of events, and other promotional vehicles.
- J. **Evaluation of Program.** Contractors under this program shall provide free entrance (for up to 10) HTA staff (or their designee) to review and monitor the project for evaluation purposes.
- K. **Reporting Requirements.** Contractors under this program shall submit a progress report, a final report, and a final financial report.

V. PROPOSAL GUIDELINES

Proposals must be submitted per the instructions in Section I of this RFP.

Your submission will consist of your written proposal and accompanying forms.

I. DOCUMENT 1 – WRITTEN PROPOSAL

You are limited to 25 pages for the written proposal. Failure to adhere to the page limit could result in disqualification. Form A includes a space to input your website address, and evaluators will have an opportunity to view your photos, collateral, etc., through that website. We recommend that you not waste space with slide deck formats and instead focus on including as much substantive content as possible.

A. Demonstrated Past Performance and Capabilities (30 points sub-total)

- Description of Organization: Provide a brief history of the establishment, development, and accomplishments of the organization.
- Qualifications and Expertise: Describe the qualifications and expertise of the individuals responsible for implementing the project.
- Related Projects: List experience with similar projects with comparable scope of work. Provide client references for the projects and among all projects at least five references with which the company has worked within the last three years. Provide relevant certifications.
- Capability: Show that the company has adequate staffing and resources to complete the work effectively and on time.

B. Comprehensive Plan (50 points sub-total)

- Project Description: Provide a description of the project or event. What is your vision?
- Project Work Plan: Provide a Project Work Plan with tasks, milestones, and deadlines. Also provide a detailed description of, and your overall vision for, the project, including but not limited to:
 - Program dates
 - Location(s)
 - Identify the need being filled
 - Target audience
 - Expected participants, community involvement
 - Major elements of the program
- Marketing Plan: Provide a detailed description of your marketing program including the activities/tasks you will undertake to increase the exposure and the number of visitors attending or participating in your event from outside of the State of Hawai'i. In addition, provide a detailed description of the following:
 1. Exposure: Describe what media assets will be provided to HTA, which highlight the Hawaiian Islands through your event, such as on-air, on-site, and on-line. For example:
 - a. Who will broadcast event
 - b. On what platforms will the event be broadcast (on-air/live, tape delay, streamed)

- c. To what countries will the event be broadcast
 - d. To what mainland markets will the event be broadcast
 - e. Date and time slots which the event will be broadcast and re-broadcast (prime-time positioning is desirable)
 - f. Number of commercial spots
 - g. Vignettes and bumpers featuring unique attributes of each island
 - h. On-line initiatives
 - i. On-site initiatives
 - j. PR components
 - k. Other advertising and promotions
2. Market Penetration: Describe what markets your event will penetrate. HTA's major market areas: U.S. mainland, Canada, Japan, Oceania, Europe, Korea, China, and S.E. Asia. (See Attachment A-E.)
 3. Highlighting State's Diversity: Describe how you will highlight unique attributes of Hawai'i during the event. Proposed event must highlight the unique attributes of Hawai'i, including by not limited to, the major Islands of Hawai'i (Kaua'i, O'ahu, Maui, Moloka'i, Lāna'i, Hawai'i), natural resources, culture, activities, attractions, and other events, and will be benchmarked on number of attributes highlighted.
 4. Highlighting Host Culture: Describe how you will highlight the host culture through the event using Hawaiian language, support of practitioners and engagement with the Hawaiian community.
- Community Involvement: Describe how you will provide community involvement with your event(s), such as camps, clinics, outreach (school or hospital visits), unique concepts using teams/players/participants, and the visitor to resident ratio attending or participating in the event.
 - Economic Impact: Provide the number of out-of-state participants and spectators. Calculate the financial impact using the 2015 DBEDT Economic Impact Formula.
 - Measures of Success: Achieve and exceed micro measures and KPIs such as: Attendance, Economic Impact, Market Penetration, Exposure, and Number of Community Programs. In addition, describe the applicable accountability and performance measurements for all work to be performed in this project. How will you measure if the proposed project was successful? What do you expect to be the benefits and outcomes of the project? These indicators of success should reflect measures that can be reliably and accurately attained, and that demonstrate a successful project, as articulated in the proposal outline. While some measures may be qualitative, please provide detailed quantifiable values where possible.
 - Past Results: If this is an existing event, provide actual results from most currently available year (preferably within the past three years). These past results do not necessarily have to match the measures and targets identified for this RFP.

II. DOCUMENT 2 – FORMS AND ATTACHMENTS

- **FORM A – APPLICANT INFORMATION FORM**: This is a fillable form. Once you have completed the form, the form must be printed then signed by a person authorized to bind the organization.
 - **Primary RFP Contract**: The person listed here will be our contact regarding any updates to the RFP process and any questions regarding your submission, as well as any award notices.

- Primary Promotional Contact: This person listed here will be our post-award contact during the contract phase.
- Web address: Please do not attach any collateral materials, etc. Evaluators may access your website to view pictures, videos, collateral material, or other matter.
- **Attachments to Form A:** Please attach the following documents to Form A. Please do not attach any material not specifically requested.
 - W9
 - Certificate of Vendor Compliance (if available)
 - Proof of Liability Insurance (if available)
- **FORM B – ITEMIZED BUDGET SPREADSHEET:** This is a firm fixed price contract. All deliverables should be itemized and quantified to simplify the creation of a pay schedule, as well as to provide a basis in the event of liquidated damages. Contractor is welcome to propose a pay schedule for consideration by the HTA. It is expected that Contractor will be able to achieve all the goals set out in the Proposal without the need for any additional monies.
 - Total Expenses and Total Income in each column should be equal. (e.g. Total Expenses to be covered by HTA SE financial support (a) should equal Total Income from HTA SE requested (a).)
 - The sum of columns (a), (b), and (c) must equal column (d).
 - Program Expenses: This category includes program operating costs such as equipment rental (e.g., tents or sound equipment), entertainment, travel, security, office supplies, postage, etc. Generally, SE funds are not approved to support general operating expenses of the organization itself.
 - Marketing Expenses: This category includes advertising, promotional activities and/or items such as posters, flyers, brochures, collateral materials, public relations, and website development or enhancement.
 - Administrative Expenses: This category includes administrative fees relating to expenses needed for management of the proposed project. Examples include: costs of board of directors' meetings, general legal services, accounting, insurance, office management, auditing, human resources, and other centralized services. The targeted percentage for administrative expenses should not exceed 20% of the total amount requested from the HTA.
 - Cash Match Requirement: A minimum of one-to-one (1:1) in matching funds to the amount of funds requested. Matching funds can be in the form of cash or in-kind contributions. If the match includes in-kind contributions, **a minimum of fifty percent (50%) of the match must be in the form of cash.**
- **FORM C – BUDGET NARRATIVE:** This is a fillable form with a 3000-character limit. This form is your opportunity to explain the numbers in the spreadsheet.
- **FORM D – KPI TARGETS:** Please project your target numbers for the program. If awarded, the evaluation of the success of your program/contract will be based on these projections and could affect the STATE's willingness to renew the contract and for what amount.

- **FORM E – HTA IMPACT WORKSHEET:** Follow the instructions in the first tab of the Excel worksheet. (Go to each market area tab – U.S. West, U.S. East, Japan, Canada, Other International – and replace the number in box C6 for each tab with your own estimated number. These numbers should automatically generate in the Total Impact tab.)

Note to Government Agencies:

Government agencies applying for this RFP are exempt from the following requirements:

- Certificate of Vendor Compliance
- Certificate of Insurance.

Disclaimer

Cancellation and Cost Liability

HTA reserves the right to cancel any component of this RFP, or the total RFP, at any time. HTA assumes no responsibility and bears no liability for costs incurred by an applicant in the preparation and submittal of proposals in response to this RFP.

Further Questions and Clarifications

Please email contracting@gohta.net.

VI. RFP PROCESS & SCORING CRITERIA

RFP PROCESS:

An evaluation committee will evaluate all the offerors' submittals based on the below outlined criteria. This process may or may not consist of two phases.

Phase I of this process will be the applicant's written electronic submission. To assist applicants in understanding the RFP and to clear up any inconsistencies, the HTA will accept pre-submittal questions, in writing via word doc, until the time and date established in the Procurement Timeline found in Section I of this RFP. The HTA, and the evaluation committee, reserve the right to select an applicant based on written proposals only.

In Phase II, the HTA may, at its own discretion, select a short list of one or more applicants for further consideration. This could take the form of, including but not limited to, an oral interview, a request for clarification, a request for best and final offer (BAFO), reference checks, negotiation of key provisions, or any combination thereof. The HTA is under no obligation to enter into an agreement with any of the short-listed offerors.

The HTA intends to conduct a comprehensive, fair, and impartial evaluation of proposals received in response to this RFP. The HTA will use an Evaluation Committee to review and evaluate the proposals. The HTA's contact person is the Procurement Officer and serves as the arbitrator and referee for this RFP. The Procurement Officer does not have a vote. Applicants are forbidden from contacting any member of the Evaluation Committee regarding this RFP. Any attempt to knowingly contact voting members of the Evaluation Committee regarding this RFP could be grounds for disqualification.

Applicants are to rely, for information regarding this RFP, on the RFP itself and information provided by the Procurement Officer. The HTA is not responsible for any misinformation received from other sources.

If it becomes necessary to revise or amend any part of this RFP, the HTA will distribute a revision by written addendum. Applicants will be responsible for adhering to the requirements of any addenda to this RFP.

APPLICANT RESPONSIBILITIES:

A proposal shall be electronically submitted as instructed in Section I of this RFP and will be accepted only if timely received. The responsibility for submitting a response to this RFP on or before the stated due date and time will be solely and strictly that of the applicant. The HTA will not be responsible for emails that are not received because the file is too large or because it was delivered to the wrong email address, or deliveries that are not received due to traffic or other delivery complications.

Proposals will be considered incomplete if Form A does not bear the signature of an authorized individual, officer, or agent of the Applicant who is in a legal position to contractually bind the applicant. The proposals can be withdrawn at any time, if requested in writing, until notice of selection, at which time it will be considered final.

By submitting a proposal, applicant agrees to accept and abide by the terms of this RFP. The HTA reserves the right to reject any or all proposals, to waive any informality or irregularity, and to accept any proposals which it may deem to be in the best interest of the State of Hawai'i.

SCORING CRITERIA:

All applicants will be scored according to the same criteria.

- 1. Experience and Professional Qualifications (20%):** Ability to produce, implement, and execute the project. Has established network. Demonstrated success and expertise necessary to perform the project described. Related experience with projects of a comparable scope of work, and complexity as described in this RFP as demonstrated by comparable projects which required data collection, scanning, programming, processing and reporting. Qualifications and experience of the individuals in the respondent's team, including the demonstrated past success of the respondent's key personnel will also be reviewed.
- 2. Quality and Reasonableness of Proposal (50%):** Respondents shall be rated on their proposals. Respondents will also be rated on the reasonableness of the proposed time schedule.
 - i. Project Components
 1. Meets Signature Events goals and objectives
 2. New Project – development of new experiences that have not been offered by others more generally
 3. Enhancement of Existing Project – demonstrates enhancement and/or innovation of existing project or event to better the experience for the attendee
 4. Shoulder Season (Spring or Fall shoulder)
 5. Executable Marketing & Promotional Plan – demonstrates the ability to reach the right target audiences to ensure visitor and resident attendance and/or participation goals. Plan should show there is sufficient reach, frequency, and other measures to be effective and is timed appropriately to affect awareness, consideration and conversion of audience. Provides for high visibility for the Hawaiian Islands through media platforms.
 6. Work Plan and Timeline – work plan and timeline appears reasonable to execute the event
 7. Community Support and Involvement – evidence of partnerships with outside organizations and visitor industry partners. Project has broad based community support and is in line with community value and community resources.
 8. Demonstrates significant economic impact
- 3. Project Impact (15%)**
 - i. Reasonable and significant measures identified demonstrating positive impact on Hawai'i's community and visitor industry future. Positive impacts to the community and economy compared to similar projects. Plan to acquire the required measures and targets listed above is clear, resource needs are adequately addressed, use of information will lead to sustainable projects. Includes evaluation of information provided in FORM D – KPI Targets and FORM E – HTA Impact Worksheet.

- 4. Price/Budget (15%):** Reasonable proposed budget demonstrating an ability to achieve the stated objectives of the program. Includes information provided in FORM B – Itemized Budget and FORM C – Budget Narrative.
- i. Demonstrates organizational financial capability
 - ii. An accurate and feasible budget for the project
 - iii. Valid sources of revenue.
 - iv. Reasonableness of estimated expenses comparable to similar event/activity.
 - v. A minimum of 1:1 match or better on requested funds, with at least 50% of the match in other cash.

The HTA, through its evaluation committee, reserves the right to reject any and all proposals and to waive minor irregularities. The HTA further reserves the right to shorten or extend posted schedule dates when doing so is reasonably in the best interest of the State of Hawai'i.

EVALUATION OF SUBMISSION	Scoring Range	Evaluator Score
Experience and Professional Qualifications	1-20	
Quality and Reasonableness of Proposal	1-50	
Project Impact	1-15	
Price/Budget	1-15	
TOTAL SCORE	4-100	

Evaluation Criteria

The evaluation factors and score sheet for this RFP are provided in the attached Exhibit 2, Evaluation Scoring.

VII. PROVISIONS, CONDITIONS, DISCLAIMERS, AND DISCLOSURES

An applicant shall read each section of the RFP thoroughly. While sections of the RFP may appear similar to other RFPs issued by the HTA, additional information may be added as applicable. It is your responsibility to understand the requirements of this RFP.

1. Authority

- (a) Law. This RFP is issued under the provisions of Chapter 201B, HRS. All prospective applicants are charged with presumptive knowledge of all requirements of the cited authorities. Submission of a valid executed proposal by any prospective applicant will constitute admission of such knowledge.
- (b) State Procurement Code. HTA procurement is not subject to the Hawai'i Public Procurement Code codified under Chapter 103D, HRS, and the administrative rules promulgated thereunder ("Hawai'i Procurement Code"). However, the HTA may consider the Hawai'i Procurement Code as guidance.

2. Government Contract

This is a contract with a government agency. As such, customary rules of commercial contracting generally do not apply. Applicants are encouraged to seek advice from experts familiar with government contracts.

3. Procurement Timetable

Note that the schedule of procurement key dates provided herein represents the HTA's best estimate of a schedule that will be followed and may be changed from time to time. Any changes to this schedule will be directly transmitted to applicants who have registered for updates as described in the Overview and Timeline section of this RFP. Any changes to the timetable can also be seen in the Addendums posted to the RFP on the HTA website referencing this RFP. Contract start dates are subject to the issuance of a notice-to-proceed. Some items on the Procurement Timetable may not be necessary or may be for informational purposes only.

4. Contracting Office

HTA is the Contracting Office and is responsible for overseeing the contract resulting from this RFP, including monitoring and assessing the contractor's performance.

5. Pre-Submittal Orientation Meetings

HTA will be scheduling pre-proposal information sessions as noted in the Procurement Timeline. Exact times and locations will be published on the website and sent to those who have registered for updates as described in the Overview and Timeline section of this RFP.

6. Submission of Written Questions

- (a) Written Questions. HTA welcomes written questions from applicants to ensure openness and transparency and improve understanding of the RFP. Applicants may submit written questions in electronic format, as a separate email attachment, to the email address identified in Section I of this RFP. To expedite responses, applicants are required to submit questions on a Microsoft

Word document. Each question must cite the RFP page and paragraph that is the source of the question. HTA will respond to written questions as discussed below.

- (b) Deadline. Deadline for submission is listed in the Procurement Timeline.
- (c) Responses. The HTA Procurement Officer will combine the questions from all applicants into a single list. Similar questions may be combined and responded to as a single question. The HTA will provide the combined set of questions and responses to all applicants at the same time. The applicant who submitted the question will not be identified in the responses. The HTA will act in good faith in providing responses, but may decide, in its sole discretion, not to respond to some questions. Depending on the number and type of questions received, the HTA's responses to written questions submitted by applicants, who have submitted the Interest Form with their contact information, will be provided to all applicants by the date set forth below. The HTA's interpretation of the written question and its response will also be posted on HTA's website. However, if the volume and type of questions preclude the HTA from meeting this deadline, the HTA will notify applicants, who have submitted the Interest Form with their contact information or through a posting on HTA web site, of the revised date for such response.

7. Proposal

- (a) Statement of Qualifications. An applicant must submit a completed Form A – Applicant Information Form, and all the requested documents, exhibits, attachments, executed and/or responsive appendices, acknowledgments, written comprehensive narratives, and other information described in and submitted in response to this RFP.
- (b) Proposal Submittal. Deadline for submission is listed in the Procurement Timetable.
 - (1) See Section I Overview and Timeline for delivery instructions. All proposals must be actually received by the HTA no later than the submittal deadline. Proposals may be rejected if received after the designated date and time. The official time will be recorded via the email signature if emailed, or by the time clock maintained at the HTA Drop-Off Site if delivered as a flash drive.
 - (2) Interested parties must submit a proposal in the manner outlined in this RFP. Facsimile copies will not be accepted. Video, audio, or other similar multimedia materials will not be considered during evaluation of proposals, although they may be accepted in Phase II of the procurement process.
- (c) RFP Submittals Become the Property of HTA. All proposals and other materials submitted will become the property of the HTA and will not be returned. The HTA reserves the right to retain all submittals and to retain any ideas in a submittal regardless of whether an Applicant is selected. Submittal of any response to this RFP indicates acceptance by the Applicant of the conditions contained within the RFP document.
- (d) Contract. The RFP and the applicant's selected proposal may, by reference, become a part of the final Contract between the selected Applicant and the HTA resulting from this solicitation process.
- (e) Expenses. Each applicant is solely responsible for all expenses incurred for the preparation of their proposal and its participation in any pre-award presentation or discussions and other activities related to the evaluation process and the development and submission of any proposal provided by an applicant in response to this RFP, including without limitation, any travel related

or presentation expenses incurred to present or discuss the applicant's Proposal submission. An applicant may not bill the HTA for any costs or expenses associated with its response to this RFP. Any incumbent under any HTA contract may not use HTA-funded resources to prepare its Proposal.

- (f) Protests. Any protest of anything in this RFP or any referenced document, must be filed by the deadline for protests of the content of the RFP to be timely.

8. Multiple or Alternate Proposals

An applicant may submit separate proposals for different projects if the projects are clearly different and distinguishable. Multiple or alternate proposals from the same applicant for the same project are not allowed. In the event alternate or multiple proposals are submitted, all of the applicant's submissions may be rejected at the discretion of the HTA Procurement Officer.

9. Competitive, Multi-Step Sealed Proposals

Two-Step Process. Proposals submitted under this RFP may be evaluated in a two-phase elimination process. The first phase will compare each proposal to the requirements of this RFP for compliance and will include a comparative evaluation of the various applicants' proposals. The second phase, if needed, may include applicant oral interviews, interviews with general manager candidates, reference checks, best and final offer (BAFO), contract negotiations and other evaluation methods deemed appropriate by the HTA. Applicants must pass the first phase to be considered for evaluation in the second phase. Final selection for award will be made from among the remaining applicants in the final phase.

10. Rejection of Proposals

- (a) Requirements Must Be Met. The HTA reserves the right to consider as acceptable, responsible and responsive only those proposals submitted in accordance with all requirements set forth in this RFP, that demonstrate an understanding of the services to be provided, and challenges associated therewith.
- (b) Changing Terms. Any proposal requiring any contract terms or conditions contradictory to those included in this RFP and the General Conditions attached as Exhibit 1 may be rejected in its entirety without further notice. Applicants may suggest alternate terms or conditions with a specific explanation of how the change would result in improvements to price, schedule, or performance. The suggestion must specifically quantify the impact. Such suggestions are not accepted or implemented unless included in the final terms and conditions in the Agreement signed by both parties. (Hawai'i State General Conditions can be found online at <http://spo.hawaii.gov/wp-content/uploads/2014/02/103D-General-Conditions.pdf>.)
- (c) Reasons. A Proposal may be automatically rejected for any one or more of the following reasons:
 - (1) Failure to cooperate or deal in good faith;
 - (2) Inadequate accounting system or internal controls;
 - (3) Late proposals;
 - (4) Failure to submit in accordance with the RFP or otherwise inadequate response to the RFP;
 - (5) Lack of demonstrated experience or expertise; and
 - (6) Failure to maintain standards of responsibility. Any Applicant found to have falsified any information to the HTA in relation to this or any other procurement, or which has been suspended or barred from doing business with the HTA, the State of Hawai'i including any of

its subdivisions and agencies or the United States government, or which has been convicted of a felony related to procurement contracting with any unit of government, or which has failed to maintain necessary licensure or meet its tax or other obligations to a government agency may be rejected.

- (d) The HTA, however, reserves the right to waive any or all informalities, irregularities or deficiencies when it considers a waiver to be in its and the public's best interest.
- (e) Protests. Any protest of rejection of a proposal must be received by HTA within five (5) calendar days after receiving notice from HTA of the rejection of an applicant's proposal.

11. RFP Amendments

HTA reserves the right to amend this RFP at any time prior to the deadline for the submission of final proposals.

12. Register of Proposals

After the date established for receipt of Proposals, HTA will prepare a Register of Proposals received, including, for all proposals, the name of each applicant and the date the HTA received the applicant's proposal and any modifications to the proposals. The Register of Proposals will be open to public inspection only after award of the contract(s) under this RFP. Proposals and modifications will be shown only to a requester having a legitimate interest in them as required or authorized by law.

13. Opening of Proposals

Upon receipt of a proposal by the HTA, any modifications, questions and responses will be date-stamped, and when possible, time-stamped. The HTA will hold all documents so received in a secure place and not examine them for evaluation purposes until the submittal deadline. The time clock maintained at the Drop-off Site will be used to record the official time for receipt of proposals.

14. Public Inspection

Procurement files, including proposals, will be open to public inspection to the extent allowed by law only after all contracts under this RFP has been awarded and executed by all parties.

15. Presentations and Discussions with Applicants

- (a) Applicants Defined. As used herein in this RFP, "Applicants" means only those individuals, persons, or entities submitting proposals that are acceptable or potentially acceptable and does not include those who submitted unacceptable Proposals.
- (b) Presentations and Discussions defined. As used herein in this RFP, "Presentations" means non-written communication by Applicants to the Evaluation Committee under conditions set by the HTA. "Discussions" means any communication between an individual applicant and the Evaluation Committee or HTA staff for the purpose of allowing the HTA to complete its Proposal evaluation. Oral interviews may include Presentations and Discussions.
- (c) Discretionary. In its discretion, the HTA may decide to select based on written proposals alone as submitted and without any oral presentations or discussions.
- (d) Invitation. After evaluation of the proposals, the HTA may invite applicants it considers to be in the competitive range to participate in pre-award presentations and discussions. The HTA may limit the number of proposals in the competitive range to a reasonable number that will permit an efficient competition among the most highly rated proposals.

- (e) Participation. Each applicant that accepts the invitation will be required to provide access to the applicant's team assigned to this effort. The applicant's team may include a project manager that the applicant proposes to assign as part of the core project team.
- (f) Objectives. There are several objectives of the Presentation and Discussion, including:
 - (1) To compare the HTA's requirements to the services proposed by the applicant as described in the written Proposal;
 - (2) To allow the applicant to demonstrate how the requirements can be satisfied by the proposal;
 - (3) To identify significant gaps in required and proposed services as described in the written proposal; and
 - (4) To provide the applicant with an opportunity to discuss their methodology, scope of services and project plan.
- (g) Location. The Presentation and initial Discussions will be at the HTA's facilities in the Hawai'i Convention Center on Oah'u, or by video conference at the HTA's discretion. Discussions may continue orally or in writing and may be done over the phone, by email, letter, or other method. All discussions must be originated by HTA.
- (h) Results. The HTA evaluation committee will evaluate each applicant on its participation in the Presentation and Discussions as part of its Phase Two Proposal evaluation unless HTA decides, in its sole discretion, to make an award based on written proposals alone.
- (i) Conduct of Discussions. Applicants in the competitive range will be accorded fair and equal treatment with respect to any opportunity for Presentations and Discussions and revisions of proposals. The HTA Procurement Officer for this RFP will establish schedules and procedures appropriate for this phase of the procurement. If during discussions there is a need for any substantial clarification of, or change in, the RFP, the RFP may be amended by a modification to incorporate such clarification or change. Auction techniques (revealing one applicant's price to another) and disclosure of any information derived from competing Proposals are prohibited. Any substantial oral clarification of a proposal must be reduced to writing by the applicant.
- (j) Best and Final Offer Discussions. HTA may, in its sole discretion, request that applicants submit a best and final offer (BAFO). The HTA may invite applicants it considers to be in the competitive range to participate in BAFO Discussions. The Procurement Officer may limit the number of proposals in the competitive range to a reasonable number that will permit an efficient competition among the most highly rated Proposals.

16. Modifications, Additional Materials, and Documentation

After the receipt of proposal, if HTA deems it desirable and in its best interest, the HTA may, in its sole discretion, request that the applicant provide additional information to clarify or supplement, but not basically change, any proposal as submitted. An applicant may submit revised proposals only if requested or allowed by the HTA Procurement Officer. Written responses must be provided as requested. Failure by any applicant to provide the additional requested information or to participate in a requested meeting may be a cause for disqualification as being nonresponsive to this RFP. The applicant shall have the responsibility to document all clarifications as change pages to the proposal.

17. Notice of Selection

- (a) Notice of Selection. Upon the HTA's final selection of the successful applicant a notice of selection will be issued to the selected applicant. This RFP may be used to select one or more applicant to contract with HTA.
- (b) Notice of Non-Selection. A notice will also be sent to all non-selected applicants upon completion of the evaluation process. The notice of non-selection triggers the right to request a debriefing and starts the clock for protests based on non-selection. The debriefing may be written or oral and may be included in the Notice of Non-Selection.
- (c) Execution. Upon notice of selection, appropriate sections of the selected applicant's proposal will be used by the HTA to create the Statement of Work or to be incorporated into a contract or agreement with HTA. The applicant will promptly execute the Agreement for the services awarded to the selected applicant. Upon execution by the selected applicant of the Agreement, the selected applicant will be referred to as the "Contractor."
- (d) HTA Board of Directors Funding Approval. Funding for contracts and options is subject to the approval of an annual fiscal year budget by the HTA Board of Directors. In the event the Board does not fund the budget item used to fund this contract, the contract may be terminated for the convenience of the government.
- (e) Start Work Date. No work is to be undertaken by the selected applicant prior to the contract commencement date after contract execution by both parties. HTA is not liable for any costs incurred prior to the official starting date.

18. Confidential Information

- (a) Procurement Sensitive Information. Each proposal will be considered to contain procurement sensitive information whether or not it is so marked. No part of a proposal will be released to other applicants or the public prior to contract execution. In the event that the RFP is cancelled, release of procurement files for inspection will be subject to applicable laws.
- (b) Marking Confidential and Proprietary Materials. If an applicant believes any portion of a proposal contains proprietary and/or commercial information that should be withheld from the public due to competitive injury that would result from public release during or after the solicitation, the applicant must mark designated proprietary data as confidential and provide justification to support confidentiality. Such data must accompany the proposal, be clearly marked, and must be readily separable from the proposal to facilitate eventual public inspection of the non-confidential sections. Unless designated "Confidential and Proprietary," the proposal will be available for public inspection after the award of the contract.
- (c) Acceptable Markings. Applicants that include in their proposals data that they do not want disclosed to the public for any purpose, or used by the HTA except for evaluation purposes will be subject to the restrictions stated below.
 - (1) An applicant must mark the title page with a legend substantially similar to the following in accordance with the applicant's standard procedure or advice of counsel or other experts:
"This Proposal includes proprietary and confidential data that may not be disclosed outside the HTA and may not be duplicated, used, or disclosed, in whole or in part, for any purpose other than to evaluate this Proposal."

- (2) The applicant must mark each sheet of data the applicant wishes to restrict with a legend substantially similar to the following in accordance with the applicant's standard procedure or advice of counsel or other experts:
"Use or disclosure of data contained on this sheet is subject to the restriction on the title page of this Proposal."
 - (3) If, however, a contract is awarded as a result of, or in connection with, the submission of data, HTA will have the right to duplicate, use, or disclose the data to the extent provided in the resulting contract. This restriction does not limit HTA's right to use information contained in proposals if it is obtained from another source without restriction.
- (d) Post-Award Disclosures. HTA may disclose the following information in post award debriefings to other applicants:
- (1) The overall evaluated cost or price and technical rating of the successful applicant. (Note that the total price is not considered confidential and will not be withheld.)
 - (2) The range of scores and relative ranking of the applicant, if any ranking was developed by HTA during source selection.

19. Public Disclosure

Upon execution of the written contract, all documents submitted by the applicant and maintained by the HTA will be subject to public inspection and copying under the Hawai'i Uniform Information Practices Act provided in chapter 92F, Hawai'i Revised Statutes; provided that, any confidential commercial or proprietary information may be withheld in accordance with law.

20. Vendor Clearance

Hawai'i state law requires a Vendor Compliance Certificate (Tax Clearance, DCCA, and DLIR clearances) for all purchases/contracts of \$2,500 or more. These clearances are required prior to contract execution and must be maintained up to the time of final payment. Government agencies are exempt from this requirement. Hawai'i Compliance Express (HCE) allows organizations contracting with state and county agencies to quickly and easily demonstrate they are in compliance with state procurement laws.

There is an annual registration fee for the service. To register, go to: <https://vendors.ehawaii.gov>, complete the easy step-by-step process and pay with a credit card.

21. Legal Requirements

All contracts with HTA are subject to all applicable federal, state, county, and local laws, ordinances, rules, and regulations that in any manner affect any and all of the services covered herein. Lack of knowledge by the applicant will in no way be cause for relief from responsibility.

22. Campaign Contributions by State and/or County Contractors

Applicants are hereby notified of the applicability of HRS Section 11-205.5, which states that campaign contributions to any political party, committee, or candidate or to any person for any political purpose or use are prohibited from HTA contractors during the term of the contract. For more information, FAQs are available at the Hawai'i Campaign Spending Commission at <http://www.hawaii.gov/campaign>.

23. Terms and Conditions of Contract

- (a) Fixed Price. This contract is a fixed price contract. Contractor will be responsible for completing all the work agreed to in the proposal and contract within the budget agreed to in the proposal contract unless otherwise agreed to by HTA. HTA approval is required for any expenses to be reimbursed.
- (b) Period of Performance. See Timeline for any contract term and options.
- (c) Not to Exceed. The HTA has not set a not to exceed amount for goods and services under this contract. The applicant is asked to propose a budget for their services.
- (d) Payments. Vendor shall propose a payment schedule. Please note that HTA cannot pay for any goods or services until they are delivered and accepted.
- (e) General Conditions. The Agreement (contract) to be executed by the selected applicant shall include the General Conditions, attached as Exhibit 1 to this RFP. By submitting a proposal, applicant acknowledges and agrees to the provisions stated in those General Conditions.
- (f) Termination. During the term of the contract awarded pursuant to this RFP solicitation, HTA will review the performance of contractor and may terminate the contract for reasons such as non-performance of the contractor, including the failure to conduct the project or event, failure to exceed HTA targets, change in the funding for this program, or for the convenience of HTA.
- (g) Interpretation. The order of precedence for interpreting the contract will be:
 - (1) Hawai'i State law; then
 - (2) The Executed Agreement with any modifications, amendments, or other properly documented changes; then
 - (3) The RFP as amended; then
 - (4) HTA regulations, policies, and procedures; then
 - (5) Contractor's final proposal; then
 - (6) Course of conduct; then
 - (7) Course of dealing; then
 - (8) General principles of government contracting; then
 - (9) Industry practices.

24. Execution of Contract

- (a) Exceptions. Proposals requiring any exceptions to the General Conditions included as Exhibit 1 to this RFP may be rejected in their entirety without further notice. Applicants may suggest alternate terms in the form of special conditions with a specific explanation of how the change would result in improvements to price, schedule, or performance. Such suggestions are not accepted or implemented unless included in the final terms and conditions in the Agreement signed by both parties.
- (b) Execution. Upon the receipt of all required information, documentation, attachments, and the certificate of vendor compliance the contractor and the HTA will execute the final written agreement.
- (c) Unauthorized Work. Unless otherwise agreed, a contractor may not perform any work prior to the execution of a written contract by HTA and a contractor. All unauthorized work performed by the contractor prior to the execution of the written contract will be at the contractor's sole cost and expense.

25. Protests

- (a) Raising Concerns. Interested parties who have concerns regarding a solicitation, specifications, award, or other decision of the procurement officer should first discuss the concern with the HTA Procurement Officer within the protest time periods provided for in this RFP.
- (b) Protests. If the procurement officer does not resolve the concern to the satisfaction of the interested party, the interested party may formally protest to the HTA's Head of the Purchasing Agency (HOPA) as represented by the President and Chief Operating Officer. HTA reserves the option of having the protest reviewed by the HTA's Chief Operating Officer or Vice President of Finance.
- (c) Timeliness. Interested parties must file any protest regarding the terms of the RFP, the service specifications, or documents referenced in the RFP in writing prior to the deadline for protests of the content of the RFP. Applicants must file any protest relative to rejection of proposals, non-inclusion in the competitive range, the contract award or other perceived wrongs in writing within five (5) calendar days after the aggrieved person knows or should have known of the facts giving rise thereto, or within five (5) calendar days of the postmark or the electronic transmission date of a notice from HTA. Any issue or claim that the applicant does not protest in a timely manner is waived. Discussing concerns with the procurement officer or other HTA officials or engaging in other forms of dispute resolution does not stay the timeliness clock for protests.
- (d) Notice of Protest. The Notice of Protest will be postmarked by USPS or hand delivered to the persons indicated below within five (5) calendar days after the postmark or electronic transmission date, whichever is earlier, of the deadline for protests listed in the procurement timeline, the Debriefing Letter, or other notice sent to the protestor

HTA will consider delivery services other than USPS if received by the HTA on or before the due date.

Head of Purchasing	George Szigeti
Procurement Officer:	Ronald R. Rodriguez
Mailing Address:	Hawai'i Tourism Authority Hawai'i Convention Center, Level One 1801 Kālakaua Avenue Honolulu, HI 96815
Email:	Contracting@gohta.net

Protestors are encouraged to send letter as an email attachment for the sake of immediacy and ease of sorting.

26. Availability of Funds

The award of a contract and any allowed change, renewal or extension thereof, is subject to allotments made by the Director of Finance, State of Hawai'i, pursuant to HRS Chapter 37, and subject to the availability of State and/or Federal funds.

27. Cancellation of Request for Proposal

The HTA may cancel the RFP and any or all Proposals may be rejected in whole or in part, when it is determined to be in the best interests of the HTA. Each applicant is solely responsible for all expenses

incurred for the preparation of the Proposal and its participation in any pre-award presentation or discussions and other activities related to the evaluation process even if the process does not result in award of a contract to any party.

28. Electronic Transmissions

HTA may transmit letters or provide responses to questions to applicants via email or as an email attachment for all matters regarding this RFP solicitation after receipt of Proposals. HTA will use the email address provided by the applicant on the Applicant Interest Form (Form A). If the HTA sends an email or, in odd cases, letters via facsimile machine, successful transmission of the letter, as evidenced by the transmission report generated by the HTA's facsimile machine or the "Sent" date shown on the HTA's email, will constitute official notification to and receipt by the applicant. The date and time recorded on the HTA's transmission report or "Sent" email will be the official date and time of receipt by the applicant.

29. Conflicts of Interest

Applicants shall avoid all conflict of interests that will not prevent and deter fraud, waste, and abuse, or will not provide increased economy to maximize to the fullest extent practicable, the purchasing value of public funds. Any credible and reliable proof of such conflict of interest shall be cause to terminate any contract with HTA and withhold any funding or compensation.

30. Suspended or Debarred Contractors

A person or affiliate who is under investigation for procurement impropriety or is currently suspended or debarred in any jurisdiction, or placed on a convicted applicant list may not submit a proposal on a contract to provide any goods or services to the HTA and may not be awarded or perform work as a contractor, employee, agent, supplier, subcontractor, or consultant.

31. Collusion

The applicant, by submitting a proposal, certifies that its proposal is made without previous understanding, agreement or connection either with any person, firm, or corporation submitting a proposal for the same services, or with the HTA. The applicant certifies that its proposal is fair, without control, collusion, fraud, or other illegal action. The applicant further certifies that it is in compliance with the conflict of interest and code of ethics laws. The HTA will investigate all situations where collusion may have occurred and the HTA reserves the right to reject any and all proposals where collusion may have occurred.

EXHIBIT 1 – KPI Definitions

Key Performance Indicators (KPIs): Provided by Applicant/Contractor

(a) Advertising Measures – metrics to assess contractor’s advertising activities

Contractor shall provide for HTA approval target performance measures and shall track and report on a quarterly and year-to-date basis the following metrics for advertisements:

1. **Gross Rate Point:** A unit of measurement of audience size. Used to measure the exposure to one or more programs or commercials, without regard to multiple exposures of the same advertising to individuals. One GRP = 1% of TV households.
2. **Reach:** Unduplicated number of individuals or households exposed to an advertising medium at least once during the average week for a reported time periods (also known as Cumulative Audience).
3. **Gross impressions:** Sum of audiences, in terms of people or households viewing, where there is exposure to the same commercial or program on multiple occasions.

(b) Public Relations Measures – metrics to assess contractor’s public relations activities

Contractor shall provide for HTA approval target performance measures and shall track and report on a quarterly and year-to-date basis the following metrics:

1. Publicity value by media type is a calculation that estimates the price that professional media buyers would pay for that amount of exposure for that particular media outlet. Calculation is as follows:

Publicity Value = Article Length x Unit Reach x Cost/Impression

- Article Length: a word count of the story and also considers the number of key words mentions.
- Reach: circulation or audience
 - Newspaper, magazine and other print publication use audited circulation figures.
 - Online articles use Nielsen/NetRatings which is the global standard for Internet audience measurement. NetRatings provide the number of unique visitors to that website over a particular period.
 - Broadcast segments use Nielsen Audience Figures which is the industry standard for broadcast audience measurement.
- Cost/Impression: average figures based on type of media (print, internet, TV/radio). Not based on ad rates.

2. Number of impressions by print, online, broadcast (TV and Radio): The number of those who might have had the opportunity to be exposed to a story that appeared in the media. The total audited circulation of a publication or the audience reach of a broadcast. Total Impressions = Circulation X 3.5

(c) Web Analytics – metrics to assess the performance of the website

Contractor shall provide for HTA approval target performance measures and shall track and report on a monthly and year-to-date basis the following metrics:

- Unique visitors
- Average site duration
- Page views

(d) Social Media Metrics – metrics used to assess the contractor’s social media efforts.

Contractor shall provide for HTA approval target performance measures and shall, in coordination with HTA’s internet services provider track and report on a quarterly and year-to-date basis the following metrics:

- 1. Conversation Rate:** Tells how effective Social Media efforts were in sparking conversations.
- 2. Amplification Rate:** Tells how effective in adding value on Social Media channels. If a message is posted that’s relevant and valuable to your followers, they’ll in turn want to repost and share it for their friends to see.
- 3. Approval (or Applause) Rate:** Tells the rate at which the posts are endorsed by your audience. A post that is relevant and of value will garner a higher rate of approval.

Examples of the metrics include but are not limited to:

Facebook

- **Conversation Rate:** Number of Comments per Post
 - Example: There is an average of 48 comments per post in the month of February. Thus, the conversion rate is 48:1
- **Amplification Rate:** Number of Shares per Post
 - Example: There is an averaging 66 'shares' per post in the month of February. Thus, the amplification rate is 66:1
- **Approval (or Applause) Rate:** Number of (Post) Likes per Post
 - Example: We experiences an average of 519 Likes per Post in the month of February. Thus, the Applause Rate is 519:1

Twitter

- **Conversation Rate:** Number of @ Replies per Tweet (including Direct Messages)
- **Amplification/ Applause Rate:** Number of Retweets per Tweet

EXHIBIT 2 – EVALUATOR SCORING

Assessment	Scoring Guidelines	Evaluator Score (Total)
Poor	<ul style="list-style-type: none"> Proposal is inadequate in many basic aspects for the scored category (team, expertise, approach or price) Evaluator has very low confidence in the applicant's ability to perform as promised or as required 	1-20
Marginal	<ul style="list-style-type: none"> Proposal minimally addresses the requirements, but one or more major considerations of the category are not addressed, or lacking in some essential aspects for the specific criteria Evaluator has low confidence in the applicant's ability to perform as promised or as required 	21-40
Adequate	<ul style="list-style-type: none"> Proposal adequately meets the minimum requirements for the category and is generally capable of meeting the state's needs for specific criteria Evaluator has confidence in the applicant's ability to perform as promised or as required 	41-60
Good	<ul style="list-style-type: none"> Proposal more than adequately meets the minimum requirements of the specific criteria, and exceeds those requirements in some aspects Evaluator has high confidence in the applicant's ability to perform as promised or as required 	61-80
Excellent	<ul style="list-style-type: none"> Proposal fully meets all requirements and exceeds most requirements Evaluator has extremely high confidence in the applicant's ability to perform as promised or as required 	81-100

SCORING NOTES

1. Preparation. Evaluators will read the RFP requirements and then review the applicant's Proposal response and assess how well it meets the needs of the HTA as defined by the RFP.
2. Worksheet Mandatory. The Evaluator Worksheet will be used by the evaluators. Evaluators will record their score on the Evaluator Worksheet. Scores will be based on the number of points for each evaluation component, which is provided in the Scoring Range column of the worksheet.

3. Independent and Individual Review. The committee will review the received Responses and independently score each Proposal. Scores will be in accordance with the Scoring Rating System and will represent each evaluator's best subjective judgment.
4. Scoring Rating System. Each scored item will receive a score based on the rating descriptions. Use whole numbers only. A zero score is not allowed.
5. Convening Committee Meetings. The committee meeting(s) will be convened by the HTA Procurement Officer on the date and time designated. Each member will bring his/her completed Response evaluation forms. The members will discuss the individual scores and, as a result of the discussion, each member may adjust the member's individual scoring up or down as appropriate. There is no requirement that members reach agreement on the score for a particular question/requirement. In the event the members do not reach agreement on a score for a particular question/requirement, the HTA Procurement Officer will average the individual scores to determine the Proposer's score for that particular question/requirement.
6. Maintaining Agency Records. All evaluation/negotiation documents/forms completed by each evaluator and by the committee will be collected by the HTA Procurement Officer and become part of the official record and subject to the Hawai'i Open Records Act.