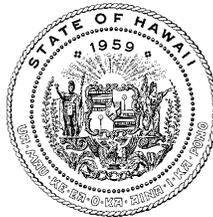




**REQUEST FOR PROPOSAL
for
VISITORS' SATISFACTION AND ACTIVITY SURVEY FOR
CALENDAR YEARS 2021-2023**

HTA RFP NO. 21-11



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

Date of Issuance: September 14, 2020

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

DEADLINE FOR RECEIPT OF PROPOSALS IS
Friday, October 16, 2020, 4:30 p.m. HST
See Proposal Outline for Submission Requirements

REQUEST FOR PROPOSAL
for
VISITORS' SATISFACTION AND ACTIVITY SURVEY FOR
FOR CALENDAR YEARS 2021-2023

HTA RFP NO. 21-11

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SECTION 1 – OVERVIEW AND TIMELINE

1.01

Introduction

The HAWAII TOURISM AUTHORITY (“HTA” or “STATE”) is issuing this Request for Proposals (“RFP”) to seek a qualified contractor to conduct a VISITORS’ SATISFACTION AND ACTIVITY SURVEY FOR CALENDAR YEARS 2021-2023 (VSAT SURVEY).

The contractor shall collect, process and report Statewide and Island Visitors’ Satisfaction and Activity Survey data. Samples for this survey shall be generated from HTA’s Domestic Inflight Survey, the International Departure Survey, and the Island Departure Survey. A selected number of visitors from the top four visitor markets: U.S. West, U.S. East, Japan, and Canada shall be contracted to participate in the VSAT SURVEY. Applicants may also propose to sample visitors from other visitor markets including Oceania and Korea. Visitors to all islands, including Molokai and Lanai, shall be sampled for island-specific questions. Respondents to this RFP shall propose data collection methodology and sampling plan. Contractor will be required to scan (if needed), edit and code all completed survey forms and report and analyze results by applying statistical, sampling and weighing techniques to the processed data. Output files must be compatible with IBM SPSS version 22.

Potential applicants are strongly encouraged to sign up for updates to this RFP at <https://htacontracts.wufoo.com/forms/pt86ae61cwvmbz/>. Those who fill out the form in a timely manner will receive notice of changes and addendums directly to the email indicated on the form.

1.02

Procurement Timeline

The Procurement Timeline represents the HTA’s best estimates. Dates may be subject to change. Notice of changes will be emailed to those who register for updates (see paragraph 1.04) and will be posted on the HTA RFP page as an Addendum to the RFP. Applicants are solely responsible for being aware of any date changes. All times are HST.

RFP 21-11 Visitors’ Satisfaction and Activity Survey CY 2021-2023	
ACTIVITIES	SCHEDULED DATE
Distribution of RFP	Monday, September 14, 2020
Deadline to email your interest if you want to receive updates	Friday, September 25, 2020
Deadline to submit written questions to HTA	Friday, September 25, 2020
RFP Addendum – Responses to Written Questions	Week of September 28, 2020
Deadline for Protest of Content to RFP	Within 5 calendar days of issuance of Addendum with answer to questions
Deadline for written proposal submissions (by 4:30 pm HST)	Friday, October 16, 2020
If necessary: Oral Presentation or BAFO Request	Week of October 26, 2020
Notice of Selection or Non-selection	Week of November 2, 2020
Deadline to Protest of Non-Award	Within 5 business days of notice of non-award
Start of Initial Contract Period	December 1, 2020
End of initial Contract Period	September 30, 2024

1.03

Vendor Qualifications

This RFP is open to in-state applicants only. Applicants must include evidence that they have applied for a Certificate of Vendor Compliance (CVC). A compliant CVC is a requirement before a contract can be signed. See Section 4 of this RFP for an explanation of the CVC.

1.04

Registration

Interested applicants are encouraged to register for updates. This is done by emailing us at contracting@gohta.net. We will not be accepting requests by phone. Those who have registered by the registration deadline will receive notice of changes and addendums directly to their email. Changes will also be posted on the RFP page of HTA's website <https://www.hawaiitourismauthority.org/RFPs/>.

1.05

HTA Research

The primary goal of HTA's Tourism Research is to continue to provide the State of Hawai'i with timely and accurate visitor information, which is useful to policy makers, industry leaders and businesses for economic development and business planning purposes.

Sound business decisions based on visitor data and research is important for effective development. Hawai'i's visitor industry is in a very mature phase, which requires constant research and data to increase brand awareness, improve and enhance products, maintain competitive advantages against other destinations and expand to new markets. Government-based services ensure industry-wide access to this data. HTA's Tourism Research Division (TRD) will sustain efforts to make available research to educate and empower stakeholders and facilitate data driven decision-making.

The VSAT SURVEY is part of Evaluation and Performance Measures, under HTA's Strategic Plan. The Evaluation and Performance Measures program consists of various data collection and research projects that support the effective management of HTA programs and help to assess Hawaii's visitor industry relative to other competitive destinations.

1.06

Agency Authorization

HTA is authorized to execute contracts for a period of up to five years under 201B-3(a)(3) Hawai'i Revised Statutes (HRS), and conduct market development-related research per 201B-3(a)(16) HRS. HTA may enter into contracts and agreements that include Tourism research and statistics to a) measure and analyze tourism trends; b) provide information and research to assist in the development and implementation of state tourism policy and c) provide tourism information on visitor arrivals and visitor characteristics. for tourism research and statistics under 201B-7(a)(8) HRS. HTA's 2020 Strategic Plan recognizes research as being essential support element to all of the HTA's work.

1.07

RFP Point-of-Contact

Applicants to this RFP are to communicate only with the point of contact listed below. HTA is not responsible for misinformation or reliance from other sources. Please include RFP number in subject line of emails. Note: due to the COVID-related work situation, we are only taking email communication. Unless otherwise specified in a written Addendum to the RFP, the points-of-contact for this RFP are:

Ronald D. Rodriguez, Head of Contracts & Procurement
Evita Cabrera, Contract Specialist

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

Email: contracting@gohta.net

1.08

Website Reference

The following is a list of websites referenced throughout this RFP.

Item	Website
Hawai'i Tourism Authority Website	www.hawaiiauthority.org
HTA RFP Website	http://www.hawaiiauthority.org/RFPs
HTA Five-Year Strategic Plan	https://www.hawaiiauthority.org/media/4286/hta-strategic-plan-2020-2025.pdf
HTA Research	https://www.hawaiiauthority.org/research/
Hawai'i Compliance Express (Certificate of Vendor Compliance)	https://vendors.ehawaii.gov
eHawaii.gov YouTube Channel	https://www.youtube.com/user/eHawaiiGov1/videos
Hawai'i State General Conditions	https://dhrd.hawaii.gov/wp-content/uploads/2017/08/103D-General-Conditions.pdf
Chapter 201B HRS. HTA's inception statute.	https://www.capitol.hawaii.gov/hrscurrent/Vol04_Ch0201-0257/HRS0201B/HRS_0201B-.htm

1.09

Submission of Questions

Applicants may submit written questions to contracting@gohta.net by the date specified in the [timeline](#). The HTA will share answers via an Addendum to this RFP. Please provide questions as an unprotected Word document, not as a PDF or picture.

1.10

Disclaimer: Cancellation and Cost Liability

HTA reserves the right to cancel any component of this RFP, to change portions of the RFP, or to cancel the RFP in its totality 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.

SECTION 2 – CONTRACT SPECS

2.01

Overview

The Visitors' Satisfaction and Activity Survey (VSAT SURVEY) is an on-going project that has been a part of the Dept of Business, Economic Development and Tourism/Hawai'i Tourism Authority Tourism Research Program since 2002. The purpose of the VSAT SURVEY is to monitor visitors' satisfaction with the State of Hawai'i as a vacation destination, their likelihood to recommend Hawai'i to others, their likelihood to return to the islands and their participation in various activities while in Hawai'i. The survey also asks about visitors' trip planning information, the source of information used in trip planning, and demographic profiles (income, education level, gender and age). Beginning 2018, the VSAT SURVEY expanded to include more island specific questions regarding visitors' satisfaction with activities and services offered on the island(s) they visited. Data from this study have been posted in HTA's Annual Visitor Satisfaction Reports and Quarterly Visitor Satisfaction and Monitoring reports on the HTA website.

2.02

Scope of Work

The successful CONTRACTOR shall efficiently collect, process, and report statewide and island satisfaction and activity data from a representative sample of domestic and international visitors. Applicants shall propose the visitor markets/countries to be sampled and the minimum number of VSAT SURVEY forms to be collected based on the applicant's determination of a representative sample. The methodology should yield at least a combined total of thirty thousand six hundred (30,600) completed Statewide VSAT survey forms and Island VSAT survey forms per year for 2021, 2022 and 2023. The sample should provide acceptable results which will be reported on a quarterly and annual basis by visitor market. A completed VSAT SURVEY form is defined as having a minimum of thirty percent (30%) of the form filled out by the applicant. The ability of the CONTRACTOR to expeditiously contact selected visitors, provide them with access to the VSAT SURVEY forms, and accurately collect and process data is crucial. Reporting on a timely and up-to date basis is also critical to the success of this project.

For further details on the VSAT survey, please refer to the VSAT 2018 Documentation Manual posted on the RFP page HTA website at <http://www.hawaiitourismauthority.org/about-hta/rfps/>.

1. Equipment/Software Requirements.

The CONTRACTOR is required to have the following equipment, and to have extensive working knowledge of the following software programs:

- a) Statistical Package for the Social Sciences (SPSS) data processing software, version 22.0 or comparable.
- b) Expertise in constructing a compelling webpage with access to a user-friendly on-line version of the VSAT SURVEY forms.
- c) Ability to use optical mark scanners and data verification, handwriting recognition, and scanner programming software.

2. Overall Project Requirements.

Work on the VSAT SURVEY shall start as soon as possible upon the CONTRACTOR's receipt of a written Notice to Proceed from the HTA, including the following:

- a) Ensure compatibility of data collection with historical Statewide VSAT data sets by thoroughly reviewing the HTA's program files, procedures manual, and processing and tabulation methodologies. Seek continuous improvement in the implementation of this project according to HTA specifications and approval. In data collection, ensure that visitors selected to participate in the VSAT SURVEY have access to the survey form on a timely basis. Ensure that the monthly sample of completed VSAT SURVEYs is a fair representation across participating visitor markets. In data processing, ensure quality control to correctly scan the forms (if needed) and check data verification. In data reporting, ensure quality control to accurately generate quarterly written reports and data banners within established deadlines. In their proposal to the HTA, applicants shall detail the methods to address all these data collection, processing, and reporting issues.
- b) Meet with the HTA weekly, throughout the term of the Contract, to discuss the project. Any issues shall be resolved immediately to ensure the accurate and timely submission of the deliverables as described herein. The CONTRACTOR shall submit weekly progress reports to the HTA.

3. Survey Instrument.

Applicants shall propose the data collection procedures which may include: on-line VSAT SURVEY forms, usage of mobile devices, phone interviews, intercept interviews at the airports (subject to approval by State of Hawai'i Department of Transportation Airports Division), paper VSAT SURVEY forms by mail, etc. or any combination of VSAT SURVEY methodologies. The CONTRACTOR shall:

- a) Finalize the 2021 VSAT SURVEY forms in English and translate the form into other languages as needed, based on the sampling frame approved by HTA. The CONTRACTOR shall absorb all costs related to the survey materials including but not limited to design, translation and maintenance of the on-line survey, printing and postage, etc.
- b) If an on-line SURVEY is included in the accepted proposal, ensure that the website looks compelling and the VSAT SURVEY forms are accessible and user friendly. Ensure that the on-line VSAT SURVEY have appropriate skips for questions that are not relevant to the respondents. Ensure that data captured from the on-line VSAT SURVEY are accurately merged in the quarterly, and annual processing.
- c) If a printed survey is the accepted option, Upon HTA approval, print a sufficient number of VSAT SURVEY forms to ensure proper fielding of applicants. The print clarity and paper quality of the forms shall be approved by the HTA.
- d) Work with the HTA to test changes to the content of the VSAT SURVEY form throughout the duration of the contract. Task shall include, but not be limited to: revising questions/simplify the content, redesigning the layout, testing the questions for completeness, understandability and flow, translating from English, and adjusting data processing procedures accordingly to ensure compatibility with historical data.

4. Sample Design. The CONTRACTOR shall:

- a) Samples for both the Statewide and Island surveys shall be generated from addresses and email addresses collected from HTA's Domestic Inflight survey, the International Departure Survey, and the Island Departure Survey. Applicants shall propose the visitor markets/countries to be sampled and the minimum number of VSAT SURVEY forms to be collected based on the applicant's determination of a representative sample. The

methodology should yield at least a combined total of thirty thousand six hundred (30,600) completed Statewide survey forms and Island survey forms each year for 2021, 2022 and 2023. The sample should provide acceptable results which will be reported on a quarterly and annual basis by visitor market for Statewide VSAT and by island for Island VSAT. A completed VSAT SURVEY form is defined as having a minimum of thirty percent (30%) of the form filled out by the applicant. The successful CONTRACTOR shall work with the HTA to continuously refine the sampling plan for the VSAT SURVEY throughout the duration of the Contract.

- b) Applicants shall propose the visitor markets/countries to be sampled and the minimum number of forms to be collected based on the applicant's determination of a representative sample. Develop a methodology to draw a representative sample of visitors from, but not limited to, the following markets: U.S West, U.S. East, Japan, Canada, Oceania (Australia/New Zealand) and Korea.
 - c) Applicants shall propose the minimum number of forms to be collected for each island, based on the applicant's determination of a representative sample by island by visitor market.
 - d) On a weekly basis, the HTA shall provide image files of names, addresses, and email addresses from Domestic Inflight, International Departure, and Island Departure surveys in graphic .tif format, and corresponding data in SPSS.sav format of basic visitor characteristics. Sample only from records with visibly complete names, addresses and emails.
 - e) Contractor may also propose to sample using airport intercepts and shall provide HTA a methodology and sampling plan to ensure a representative sample for the VSAT SURVEY. Costs associated with airport clearances, including badging and customs seals, shall be included as part of the proposed budget for the VSAT SURVEY. Contractor shall describe how the intercept data will be combined with data from other sampling methods.
5. Survey Distribution and Data Collection.
- a) Applicants shall propose the most efficient and reliable method of data collection and provide detailed procedures. The objective is to have good response rates from visitors across all the aforementioned markets selected above. Selected visitors shall be contacted and given access to a VSAT SURVEY form promptly, no later than two (2) weeks after their return home.
 - b) Each VSAT SURVEY form sampled from the Domestic Inflight, International Departure, or Island Departure survey must be linked back to the In-flight survey form or the International Departure survey or the Island SURVEY form from which the name, address or email address originated.
 - c) Concurrently, work with the HTA to test changes to the VSAT SURVEY form distribution and data collection throughout the year. Task shall include, but not be limited to: testing mobile platforms, conducting intercept SURVEYs, using email addresses as contacts, etc.

6. Data Processing.

The HTA shall provide the CONTRACTOR with the current syntax in SPSS that was used for data processing and reporting. The CONTRACTOR shall:

- a) Perform regular tests throughout the term of the Contract to check on the accuracy of the data processing and reporting procedures and to ensure compatibility with historical data sets. Make adjustments as needed to ensure that all versions of the VSAT SURVEY forms (online, printed, via mobile devices) are processed correctly and outliers are appropriately handled. Offerors shall propose ways to address these issues in the RFP.
- b) Log, code and process survey forms on a timely basis. Data from multiple data collection methods must be merged into only one (1) master SPSS data file. Clean and tabulate the coded data by checking for outliers and identify items for HTA review. Data from the In-flight form or International and Island Departure survey form must be appended to the corresponding VSAT SURVEY record.
- c) Preliminary Weight: The CONTRACTOR shall weight preliminary VSAT results on a quarterly and annual basis by comparing the VSAT SURVEY characteristics against the domestic visitors and international visitor basic data series as reported by the HTA in its monthly and annual research reports. See the 2018 DOCUMENTATION MANUAL for information on current weighting scheme.
- d) Final Year-end weights: For 2021, around July 2022, the HTA will provide the contractor with final weights for calendar year 2021. At which time, the CONTRACTOR shall apply the final weights and rerun all VSAT data tables on a quarterly and annual basis.

Throughout the duration of the contract, the CONTRACTOR shall conduct tests to the data collection and data processing procedures as needed to be implemented throughout VSAT SURVEY, the CONTRACTOR shall create and test new syntax and generate new data banners to correspond with these changes.

7. Reporting and Delivery of Results. The CONTRACTOR shall:

- a) Deliver to the HTA a weekly progress report, which shall include the number of Statewide VSAT and Island VSAT forms mailed, emailed, number of visitors contacted, total number of forms returned, total number of on-line forms completed and the response rate.
- b) Ensure quality control in reporting to accurately generate tables and banners by the requested deadlines. Design banners and tabulations that accurately report the data collected. Work with the HTA to adjust the banners to reflect any modifications to the VSAT SURVEY forms. Proposals should address proposed quality control measures in detail.
- c) Deliver draft written quarterly reports for 2021 and infographics of preliminary results which shall include but not be limited to analyses of VSAT survey statistics, VSAT data tables and graphs, year-over-year data comparison, according to outline developed in consultation with HTA. Make changes as needed based on comments received from HTA. Upon receiving HTA's approval, the CONTRACTOR shall convert the quarterly reports and infographics into ADA accessible PDF format (WCAG 2.0) for posting on the HTA website.

The 1st Quarter (January-March) 2021 VSAT report, infographics and supporting data banners in SPSS shall be completed by May 2021; the 2nd Quarter (April-June) 2021 report, infographics and SPSS data banners shall be completed by August 2021; the 3rd Quarter (July-September) 2021 report, infographics and SPSS data banners shall be completed by November 2021; the 4th Quarter (October – December) 2021 report, infographics and SPSS data banners shall be completed by February 2022. A similar schedule shall apply for 2022 and 2023 quarterly reporting.

- d) Prepare a draft written annual report (in Word, Powerpoint, etc.) and companion data tables (in Excel) according to an outline developed in consultation with the STATE for the STATE review and approval by August 2022 for calendar year 2021 data. The STATE shall provide the CONTRACTOR with final weights by July 2022.

Prepare a draft annual report (in Word, Powerpoint, etc.) and companion data tables (in Excel) according to an outline developed in consultation with the STATE by August 2023 for calendar year 2022 data. The STATE shall provide the CONTRACTOR with final weights by July 2023.

Prepare a draft annual report (in Word, Powerpoint, etc) and companion data tables (in Excel), according to an outline developed in consultation with the STATE by August 2024 for calendar year 2023 data. The STATE shall provide the CONTRACTOR with final weights by July 2024.

Make changes as needed to the draft annual report, based on comments received from HTA. Upon receiving HTA's approval, finalize the annual report for posting by converting the document into ADA accessible PDF format (WCAG 2.0).

- e) Deliver draft annual report, companion tables, VSAT SURVEY banners and data files containing final annual data in format compatible with SPSS program and all syntax files containing final weights no later than one month after receiving final weights and comments from the STATE for calendar years 2021, 2022 and 2023.
- f) Maintain a valid codebook, and edit and update procedures in the Documentation Manual on an ongoing basis. Submit final version of the manual by August 31, 2022 for calendar year 2021 detailing step by step all agreed upon changes in data collection, editing, coding, processing, and tabulating of all data in accordance with this solicitation. Submit final version of the manual by August 31, 2023 for calendar year 2022 detailing step by step all agreed upon changes in data collection, editing, coding, processing, and tabulating of all data in accordance with this solicitation. Submit final version of the manual by August 31, 2024 for calendar year 2023 detailing step by step all agreed upon changes in data collection, editing, coding, processing, and tabulating of all data in accordance with this solicitation.

8. Additional Deliverables and Conditions.

- a) Provide to the HTA for each calendar year, six (6) cross tabulations of data highlight tables and banners, other than that described herein, with criteria and times to be determined by the HTA at no additional cost.

An example of a cross tabulation request: Visitors who came to play golf on O'ahu, their satisfaction with the State, with O'ahu, and their visitor profile including income, education etc. honeymoon cruise visitors, who also stayed in hotel properties on Maui, by month.

- b) Retention of Documents. Retain the printed SURVEY forms for a minimum of six (6) months. Before any forms are shredded, the CONTRACTOR shall create digital images of all survey forms and provide them to the HTA. Shredding expenses shall be included in the CONTRACTOR's proposed budget.
- c) The HTA shall be sole owner of all SURVEY results, and all survey materials including design, typeset, and TELEform and pdf files. Information may not be shared without HTA consent or approval.
- d) Maintain proper accounting procedures and practices acceptable to the HTA to include, but not be limited to, maintaining books, records, documents, and other evidence related to the project's performance. The books, records, and documents shall be subject to inspection, review, or audit by the HTA.

2.03

Time of Performance

1. The CONTRACTOR shall perform all services as necessary according to HTA specifications to ensure that visitors who came in January 2021 will be contacted and given access to a VSAT SURVEY no later than February 2021.
2. All services for 2021 shall be completed by September 30, 2022 unless extended per mutual written agreement. All services for calendar year 2022 shall be completed by September 30, 2023 unless extended per mutual written agreement. All services for calendar year 2023 shall be completed by September 30, 2024 unless extended per mutual written agreement.

2.04

Compensation and Payment Schedule

1. Award shall be made on a firm fixed price basis. (Any proposed incentives for participants must be included in the fixed price).
2. The overall budget proposed by the offeror shall consist of separate budgets for 2021, 2022 and 2023. In addition, the combined amount of these three budgets shall be shown as the total amount proposed for this project.

SECTION 3 – PROPOSAL OUTLINE AND INSTRUCTIONS

3.01

Submission Method

1. All submissions are to be sent via email to contracting@gohta.net.
2. Submission may be sent as a PDF attachment, or, alternatively, the email may provide a link where HTA may go to download the materials.
3. The time of receipt will be the time on the email. Deadlines will be strictly enforced. Please be aware that download times could delay email arrivals. Applicants who wait until the last minute to submit their proposals do so at their own risk.

3.02

Proposal Format

1. Slide shows and PPTs not accepted. The proposal should be compact and substantive. Proposals may include a web address that evaluators will have the option of reviewing. However, evaluators will not be required to review your website, so please do not omit important information in reliance of website content.
2. Format should be standard 8 1/2 by 11 inches. Orientation should be primarily portrait, though landscape is welcome for charts, tables, or data presentations as appropriate. No odd-sized pages please.

3.03

Submission Contents

All proposals shall include the following documents in the order listed. Proposals that fail to include any one of these documents may be disqualified for being non-responsive. Descriptions follow.

The Proposal should consist of the following and in the following order:

- Cover Page
- Proposal
 - Table of Contents
 - Cover Letter
 - Past Performance and Capabilities (30%)
 - Work Proposal (30%)
 - Proposed Price / Budget (40%)
- Attachments
 - Applicant Information Form (downloadable form)
 - Certificate of Vendor Compliance
 - W9

3.04

Cover Page:

Cover page should include the following:

- RFP number and name as it appears on the cover page of this RFP,
- Name and address of applicant firm.
- Name, email, phone number of person submitting the application.

3.05

Cover Letter:

This is your opportunity to make a personal statement to the HTA and to the evaluation committee.

3.06

Past Performance and Capabilities (30 points)

1. DESCRIPTION OF ORGANIZATION: Provide a brief history of the establishment, development, and accomplishments of the organization.
2. QUALIFICATIONS AND EXPERTISE: Describe the qualifications and expertise of the individuals responsible for implementing the project.
3. EXPERIENCE WITH RELATED PROJECTS: List experience with projects that required cooperation from third parties. List past projects that required data collection, data processing, scanning, and programming; with comparable scope of work and complexity to this RFP (list date and description of projects, i.e. number of forms scanned and how data were processed). Provide client references for the projects and among all projects at least three references with which the company has worked within the last three years.
4. CAPABILITY: Show that the company has adequate number of staff to implement the propose data collection procedure(s) (i.e. whether it be preparing/distributing survey packets; compiling address/emails and contacting visitors for online surveys; maintaining/trouble shooting the online survey website; adequate staffing to field at the airports etc.). Adequate number of staff to operate scanners and TELEform software, staff with extensive working knowledge in programming and SPSS data processing, with the ability to accurately generate all reports required under this solicitation in a timely basis.

3.07

Work Proposal (30 points)

1. Explain fully offeror's approach and/or process for achieving the HTA's goal and scope of work described in this solicitation. Respondents shall specify the make and model and speed of their scanning equipment.
2. Propose a work plan to address the following issues to include, but not limited to:
 - a. Applicants shall propose the most efficient and reliable method of data collection and provide detailed procedures. The objective is to have good response rates from visitors across all the aforementioned markets selected above. Selected visitors shall be contacted and given access to a VSAT SURVEY form promptly, no later than two (2) weeks after their return home.
 - b. In scanning and data processing, propose methods for quality control to correctly scan the forms, check data verification, flag, and appropriately address uncharacteristic data and outliers.
 - c. In data reporting, propose methods for quality control to generate accurate weekly progress reports, monthly highlights and banners, and annual data highlights and banners within established deadlines.
 - d. If desired, propose any project improvements that would affect costs and delivery time while maintaining data integrity and continuity.

3.08

Proposed Price / Budget (40 points)

1. OVERALL BUDGET: The overall budget proposed by the offeror shall consist of separate budgets for 2021, 2022 and 2023 as well as a combined total amount proposed for entire contract. This is a Firm Fixed-Price Contract. Any incentives must be included in the price proposed.
2. COST BREAKDOWN: Provide a breakdown showing what the budget is paying for. The cost breakdown should be clear enough that, if the HTA should decide to make adjustments to the number of deliverables, the HTA would be able to recalculate the costs based on the information provided.
3. PAYMENT SCHEDULE: Propose a payment schedule, including a timeline showing the corresponding deliverables. The payment schedule should match the Work Proposal described in the RFP.

3.09

Certificate of Vendor Compliance (CVC)

Contractors for the State of Hawai'i are required to have a compliant Hawai'i State Certificate of Vendor Compliance (CVC). (For this RFP, HTA is requiring only proof of application for a CVC, but compliance must be confirmed to sign a contract with 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>. We recommend that applicants begin the process immediately to identify any possible challenges and avoid any delays. There is a \$12 annual fee for this service.

For those who are new to the system, ehawaii.gov has a YouTube channel with information on creating an eHawaii.gov account, vendor registration, and using Hawai'i Compliance Express. You can visit the YouTube channel at <https://www.youtube.com/user/eHawaiiGov1/videos>.

The name on the CVC is the name that will be used for contracting and payment purposes. There cannot be any variation in name or tax ID. Government agencies are exempt from the CVC requirement.

NOTE: There have been delays in processing compliance requests due to the COVID-19 pandemic. Any paperwork—whether for new compliance or for renewal—should be submitted as soon as possible.

3.10

Rejection of Proposals

- **Requirements must be met.** HTA reserves the right to consider as acceptable, responsible and responsive only those proposals submitted in accordance with the requirements set forth in this RFP. This judgment may be made by HTA prior to scoring, or it may be made during the scoring process by the evaluators themselves.
- **Changing Terms.** Any proposal requiring any contract terms or conditions contradictory to those included in this RFP and any of its attachments 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.

- **Reasons.** A Proposal may be automatically rejected for reasons:
 - Failure to cooperate or deal in good faith;
 - Late proposals;
 - Lack of a Certificate of Vendor Compliance (CVC)
 - Failure to submit in accordance with the RFP requirements, or failure to supply an adequate response to the RFP;
 - Lack of demonstrated experience or expertise;
 - Inadequate accounting system or internal controls;
 - Failure to meet the terms of agreement on any previous HTA contract.
 - Failure to maintain standards of responsibility: Falsification of information. Suspension or debarment by STATE. Felony conviction related to procurement contracting with any unit of government. Failure to maintain necessary licensure or meet its tax or other obligations to a government agency.
- HTA reserves the right to waive any or all informalities, irregularities, or deficiencies when it considers a waiver to be in the best interests of the STATE.

3.11

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. Specific redactions may be executed as the law permits, but applicant should assume that any and all information will subject to disclosure.

SECTION 4 – SCORING / EVALUATION CRITERIA

4.01

Evaluation Committee

Proposals will be evaluated by a Committee whose members include at least three (3) HTA representatives, and may also include industry experts. All committee members may participate in decision-making on award recommendations provided they have no direct personal interest in the proposal in question. Evaluators sign an affidavit declaring that they will drop out of any evaluation that violates this requirement.

4.02

Procurement Officer

The HTA's primary point-of-contact serves as the Procurement Officer for this RFP. The Procurement Officer serves as the arbitrator and referee for this RFP. The Procurement Officer will serve as an evaluator only if the evaluation committee falls below the minimum number of three (3) evaluators and the HTA is unable to replace the evaluator without hindering the procurement process to the STATE's detriment. Otherwise, the Procurement Officer does not have a vote.

Your point-of-contact will change once the contract is executed. You will be assigned an HTA program manager upon award.

4.03

Contact Violations

Evaluation committee member identities are kept confidential during the RFP process. Applicants are forbidden from contacting any member of the Evaluation Committee regarding this RFP during the RFP process. Applicants will not be penalized for inadvertent communication with committee members. However, applicants will be disqualified if they seek the identities of the committee members, or knowingly seek out or contact committee members for advice or favor.

Applicants should only communicate with, and rely on information from, the point-of-contact identified in Section 1 of this RFP.

4.04

Evaluation Criteria of Proposals and of Contract Performance

Evaluation of proposal is largely reflective of the evaluation that will be used of the CONTACTOR's performance.

1. **Past Performance and Capabilities:** 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:** Respondents shall be rated on their proposals on ways to maintain data collection procedures and quality control to ensure the accuracy and efficiency of data collection, processing and reporting for this project. Respondents will also be rated on the reasonableness of the proposed time schedule.

3. Price/Budget: Reasonable proposed budget demonstrating an ability to achieve the stated objectives of the program.

4.04

Evaluation / Award Process

Submittals shall not be distributed for evaluation purposes until the submittal deadline. Deadlines will be enforced even-handedly. The RFP evaluation process may consist of two rounds.

Round 1: Proposals will first be evaluated by the Procurement Officer to have met the threshold considerations outlined in Section 3. Members of the Evaluation Committee will then score the proposals using the scoring criteria described in the RFP. Applicants will be ranked based on scores. Evaluators will then decide if there should be a second round and, if there is, where the cutoff should be regarding invitees.

Round 2: In the event of a second round, a limited number of finalists will be selected by the evaluation committee based on the average score of the first-round proposals. In the second round, the evaluation committee may request "Additional Information," which may consist of any combination of the following: question and answer sessions, oral presentations, requests for clarification, best and final offers (BAFO), or anything else that the evaluation committee may find useful in coming to a decision. The evaluation committee reserves the right, but is not required, to perform reference checks. At the end of the second round, evaluators will turn in fresh score sheets. The new scores will serve as the final scores and will reflect the applicants' overall performances in the first and second round.

The contract will be awarded based on what is deemed best for the HTA and the State of Hawai'i. The evaluation committee, based on the aforementioned process as well as on the outcome of any post-award negotiations, will make a recommendation to the President and CEO acting in his capacity as the Head of Purchasing Agency (HOPA) for his approval. Once that selection is made, a contract will be written and executed based on the process outlined in Section 6 of this RFP.

The evaluation committee reserves the right to dispense with a second round and to base its recommendation solely on the first-round proposals.

4.05

Submission Materials and Criteria

HTA may make an award decision based on initial proposal only. HTA also reserves the option to request and use any combination of the following: additional information or materials, revised or amended information or materials, oral interviews, reference checks, responses to requests for clarifications, responses to requests for best and final offer (BAFO).

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.

SECTION 5 – CONTRACTING PROCESS AND REQUIREMENTS

5.01

Award Letter

Awardee will receive a letter informing them of their selection, outlining the next steps in the contract execution process, introducing them to the managers they will be working with once the contract is executed, and advising them of any documents that are due.

5.02

Contract Execution Process

The contract execution process consists of the following steps:

1. HTA receives contractor's current Certificate of Vendor Compliance. (Required by law.)
2. A PDF of the contract is emailed to the Contractor along with instructions. If contractor agrees with the terms, Contractor prints, signs, fills out, and notarizes the contract as instructed and mails the original back to HTA's Contract Specialist.
3. HTA signs the contract. Contract is sent to the attorney general's office.
4. Deputy attorney general approves the contract for form and signs. Contract is returned to HTA.
5. HTA makes copies of the contract and distributes as follows: HTA program manager, Contractor, Hawai'i Department of Accounting and General Services (DAGS).
6. DAGS approves the contract. Once it is approved by DAGS, the contractor can start submitting invoices and deliverables as outlined in the contract's Payment Schedule.

5.03

Contractor Name

The contract will be between the STATE and CONTRACTOR. The STATE requires exact concurrence in all official documentation regarding the identity of the CONTRACTOR. This means that the name on the W9, the articles of incorporation, the certificate of vendor compliance, and on any invoices for payment, must be identical. There can be no variation in punctuation, entity type, dbas, and, of course, tax ID numbers. (See Section 4 of this RFP for information on the certificate of vendor compliance.)

5.04

Payment

Contractor will be put on a payment schedule and each payment will have associated deliverables tied to it. Contractor will be required to submit an invoice along with any related deliverables in order to receive payment. Contract might also have a cost-reimbursable element to it, in which case Contractor will need to present receipts or similar proofs of purchase.

Official invoice date is the date that the invoice and all deliverables are received and accepted by the HTA. Invoice must include the name of the CONTRACTOR exactly as it appears on the contract. Please include contract number on invoice. All required deliverables must be received along with, or prior to, receipt of invoice. Invoices must be either unsigned or signed by Contractor in blue ink. Invoices submitted prior to receipt of the necessary deliverables will not be accepted and will have to be resubmitted. Fiscal year ends June 30 and entails the temporary shutdown of fiscal processes. Invoices received at the change of fiscal, between June 15 and July 31, may be subject to delays in processing. See your program manager for details.

5.05**Evaluation of Contract Performance**

Contractor will be evaluated on their success in meeting the performance standards described in Section 4 of this RFP; the success in meeting the goals and requirements set out in the RFP, in the Contractor's proposal, and the subsequent contract.

5.06**Ownership**

This is a work for hire. All materials created in pursuit of the goals of this contract will be the property of the State of Hawai'i.

SECTION 6 – MISCELLANEOUS PROVISIONS

6.01

Due Diligence.

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.

6.02

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.

6.03

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.

Terms and Conditions of Contract

- (a) General Conditions. The Agreement (contract) to be executed by the selected applicant shall include the General Conditions. These conditions can be found on the web at <https://dhrd.hawaii.gov/wp-content/uploads/2017/08/103D-General-Conditions.pdf>. By submitting a proposal, applicant acknowledges and agrees to the provisions stated in those General Conditions. HTA reserves the right to modify or waive any clauses of the General Conditions, subject to approval by the office of the attorney general. See Section V of this RFP, Contracting Process, for any exceptions.
- (b) Termination. During the term of the contract, HTA will review the performance of the 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.
- (c) Indemnification and Defense. Paragraph 7 of the General Conditions shall not be changed. This means that, among other things, the STATE will not change this clause to include mutual indemnification; will not qualify contractor liability to include only those acts that are done negligently, recklessly or intentionally; and will not otherwise water down this clause by adding reasonableness language.
- (d) 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.

6.04

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 as describe in this section. There are two types of protest:
 - 1. Protest of the contents of the RFP. This could include, for example, protest to any of the RFP requirements or the evaluation or scoring criteria.
 - 2. Protest of non-award. A protest of non-award must be on legal and factual grounds. The protestor must show that the buyer, HTA, violated the rules set forth in the RFP or in statute, and that but for this violation the protestor might have been awarded the contract.
- (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 may be sent as an email attachment to the email listed below, sent via USPS, or hand delivered. In any event, the protest must be actually received by HTA 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 Notice of Award, 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.

Chief Administrative Officer: Keith Regan
 Procurement Officer: Ronald D. Rodriguez
 Mailing Address: Hawai’i Tourism Authority
 Hawai’i Convention Center, Level One
 1801 Kālakaua Avenue
 Honolulu, HI 96815
 Email: contracting@gohta.net

6.06

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.

6.07

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.