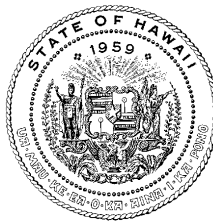




**REQUEST FOR PROPOSALS
FOR THE 2019
HAWAII TOURISM AUTHORITY
COMMUNITY ENRICHMENT PROGRAM (CEP)**

HTA RFP NO. 19-01



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

Date of Issuance: June 13, 2018

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

DEADLINE FOR RECEIPT OF PROPOSALS IS
August 3, 2018, 4:30 p.m. HST
See Proposal Outline for Submission Requirements

**REQUEST FOR PROPOSAL
FOR THE 2019 HAWAI'I TOURISM AUTHORITY
COMMUNITY ENRICHMENT PROGRAM (CEP)
HTA RFP NO. 19-01**

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EXHIBITS

Exhibit 1 Orientation Schedule
Exhibit 2 KPI Definitions
Exhibit 3 Sample Release Form

FORMS

Form A – Applicant Information Form
Form B – Proposal Form
Form C – Itemized Budget Form
Form D – Budget Narrative
W9 Form

SECTION 1 – OVERVIEW AND TIMELINE

1.1

Provisions, Conditions, Disclaimers and Disclosures

A comprehensive list of provisions is included in Section 6 of this RFP. Sections 1 through 5 of this RFP offer exceptions, clarifications, details, and reiterations of those provisions.

1.2

Procurement Timeline

The Procurement Timeline represents the HTA's best estimates. Dates may be subject to change.

RFP 19-01 COMMUNITY ENRICHMENT PROGRAM (CEP) 2019	
ACTIVITIES	SCHEDULED DATE
Distribution of RFP	Wednesday, June 13, 2018
Orientation / HTA RFP Informational Briefings	June 21-29, 2018
Deadline to submit written questions to HTA	Wednesday, July 4, 2018
RFP Addendum – Responses to Written Questions Issued	Week of July 9, 2018
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, August 3, 2018
Notice of Selection or Non-selection	Week of September 10, 2018
Deadline to Protest Award or Non-Award	Within 5 business days of notice of non-award
Mandatory CEP 2019 Contractor Meeting	TBD

1.3

Goals of Community Enrichment Program

The HTA is requesting proposals from qualified applicants for Community Enrichment Programs (CEP). Community Enrichment Program (CEP) fosters community-based tourism projects to improve and enrich Hawai'i's product offerings. These community-based projects should provide unique, authentic and highly-valued visitor experiences and represents activities that are developed by our community, for our community, and are things the community is willing to and wants to share with our visitors. CEP encourages innovative tourism products.

The objectives of the CEP are to:

- Develop new tourism products in the seven (7) targeted niche areas of agriculture, culture, education, health and wellness, nature, sports, technology and voluntourism (see Section 2.5 for definitions).
- Support community-based tourism initiatives.
- Support authentic experiences.
- Provide economic benefit to communities.
- Ensure the availability of events, activities and experiences throughout the year and distributed throughout the State. Special attention given to the "shoulder" periods of April and May, and September through the first half of December to attract additional visitors to the Hawaiian Islands

- Support marketing and promotional efforts with The Hawaiian Islands and keep in line with each islands' brand identity.
- Contribute to HTA's goal of increasing visitor arrivals, expenditures and length of stay.
- Create events, activities, and experiences which fulfill visitors' expectations of a quality destination:
 - Unique (to Hawai'i) activities/experiences.
 - Friendly interaction with residents.
 - Variety of activities/experiences.
 - Variety of cuisine and dining options.
 - Good value for the money.
- Ensure a sufficient number of quality, innovative visitor experiences to satisfy the high number of returning visitors and visitors with sophisticated needs.

1.4

Agency Overview and Authority

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.

The Hawai'i Tourism Authority's (HTA) Community Enrichment Program ("CEP") Request for Proposals ("RFP") seeks projects or events consistent with Chapter 201B-3(a)(20) of the Hawai'i Revised Statutes ("HRS") which mandates HTA to: "Coordinate the development of new products with the counties and other persons in the public sector and private sector, including the development of sports, culture, health and wellness, education, technology, agriculture, and nature tourism." In addition, the HTA Five-Year Strategic Plan 2016 lays out HTA's plan to "expand community-based programs to enrich visitor-resident interactions and economic benefits."

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.hawaiiitourismauthority.org/default/assets/File/HTA15001-Strategic%20Plan_web.pdf

1.5

Registration

Interested applicants are encouraged to register, as soon as possible, at

<https://htacontracts.wufoo.com/forms/z1ixzuhz0o79dp6/>. Those who have registered, and only those who have registered, will receive notice of changes and addendums directly to the email address listed in the registration. Changes will also be posted on the HTA's website

<http://www.hawaiiitourismauthority.org/rfps>. All dates and times are in the Hawai'i Standard Time Zone

1.6

Website Reference

The following is a list of websites referenced throughout this RFP. Web addresses under the hawaiiitourismauthority.org domain may be subject to change pending the launch of a new website. If necessary, an addendum will be issued with new web addresses.

Item	Website
RFP 19-01 Forms	http://www.hawaiiitourismauthority.org/rfps
RFP Registration	https://htacontracts.wufoo.com/forms/z1ixzuhz0o79dp6/
Hawai'i Tourism Authority Website	www.hawaiiitourismauthority.org
RFP Website	http://www.hawaiiitourismauthority.org/about-hta/rfps/
HTA Programs	http://www.hawaiiitourismauthority.org/programs/
Community Programs 2018	http://www.hawaiiitourismauthority.org/default/assets/File/Community%20Programs%202018.pdf
Ma'ema'e Toolkit	http://www.hawaiiitourismauthority.org/programs/hawaiian-culture/maemae-program/
Business Tool Kit	http://www.hawaiiitourismauthority.org/tool-kit/
Hawai'i Compliance Express (Certificate of Vendor Compliance)	https://vendors.ehawaii.gov
eHawaii.gov YouTube Channel	https://www.youtube.com/user/eHawaiigov1/videos
Green Business Program	http://energy.hawaii.gov/green-events-checklist-examples
General Conditions	https://dhrd.hawaii.gov/wp-content/uploads/2017/08/103D-General-Conditions.pdf
Chapter 201B HRS	https://www.capitol.hawaii.gov/hrscurrent/Vol04_Ch0201-0257/HRS0201B/HRS_0201B-.htm
HTA Five-Year Strategic Plan	http://www.hawaiiitourismauthority.org/default/assets/File/HTA15001-Strategic%20Plan_web.pdf
Go Hawai'i	www.gohawaii.com
Character Count Tool	https://charactercounttool.com/

1.7

Orientation / Informational Briefings

HTA management will be visiting the neighbor islands to conduct informational briefings and to answer questions about this RFP. Please see Exhibit 1 for specific times and locations:

- Maui – Thursday, June 21, 2018
- Kaua'i – Friday, June 22, 2018
- O'ahu – Friday, June 22, 2018
- Moloka'i – Tuesday, June 26, 2018
- Island of Hawai'i (Kona and Hilo) – Wednesday, June 27, 2018
- Lāna'i – Friday, June 29, 2018

1.8

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.

1.9

RFP Point-of-Contact

Applicants are to submit questions, proposals, and all RFP communication with the points-of-contact listed below. 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 points-of-contact for this RFP are:

Ronald D. Rodriguez, Contracts Specialist / Procurement Officer
Evita Cabrera, Administrative Assistant

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

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

All emails must include the RFP number in the subject line.

1.10

County Tourism Specialists

Each county has been assigned a tourism specialist whose job it is to help applicants with their applications. These specialists are not members of HTA staff, and are not evaluators, and so may be contacted without threat of disqualification and are an exception to the above-mentioned point-of-contact. Please contact the specialist in your county only. Do not contact specialists assigned to other counties. Your designated specialists are as follows:

County of Kaua'i
Nalani Brun, (808) 241-4952
nbrun@kauai.gov

City & County of Honolulu
Sharleen Oshiro, (808) 768-3893
soshiro@honolulu.gov

County of Maui
Jeremiah Savage, (808) 270-7992
jeremiah.savage@mauicounty.gov

County of Hawai'i
Frecia Cevallos, (808) 961-8505
frecia.cevallos@hawaiiicounty.gov

1.11

Disclaimer: Cancellation and Cost Liability

HTA reserves the right to cancel any component of this 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.

1.13

CEP versus Kūkulu Ola

Kūkulu Ola projects can sometimes be events-based. Please see your designated county tourism specialist, or the point-of-contact for this RFP, if you have questions regarding which program to apply for. Please do not apply for both (see paragraph 2.7).

1.14

CEP versus Aloha ‘Āina

The Aloha ‘Āina program is reserved for tangible work on, or research of, our natural environment. Eco-tourism type projects (tours, events) will usually fall under CEP, but please see your designated county tourism specialist, or the point-of-contact for this RFP, if you have questions regarding which program to apply for. Please do not apply for both (see paragraph 2.7).

1.12

CEP versus Signature Events

HTA will be releasing a Signature Events RFP in July. Please do not apply for both (see paragraph 2.7). In the simplest terms, the two events-based programs can be distinguished as follows:

CEP ensures that there is exceptional tourism projects, programs and events for visitors as well as residents to enjoy.

Signature Events are designed to draw visitors from outside of Hawai‘i to Hawai‘i specifically for the event. Signature Events require extensive marketing and media exposure nationally and internationally and are typically larger in scale than CEP events.

SECTION 2 – APPLICANT AND PROJECT ELIGIBILITY / SPECIFICATIONS

The HTA seeks proposals for projects that meet the proposal guidelines in this solicitation and the following project eligibility. Note: The eligibility requirements for the Community Enrichment Program are different from the requirements for Kūkulu Ola and Aloha ‘Āina. Please read RFPs carefully.

2.1

Eligible Applicants

Entity Type: 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. The successful applicant shall be an independent contractor and shall furnish all management, supervision, labor, and any and all other services, as required by the HTA.

2.2

Good Standing

Entities that failed to meet the terms of an Agreement on any previous CEP award may not submit a 2019 CEP proposal until issues with the previous award have been resolved and the applicant receives written permission from the respective County executing the agreement.

Note also that there is no limit to the number of years of CEP funding an applicant can receive. However, repeat applicants will want to highlight any growth or innovation they may be planning for the coming year.

2.3

Deadline for Submissions

No proposal in response to this RFP shall be considered if received after the due date and time as stated in the Procurement Timeline in Section 1 of this RFP.

2.4

Term, Location, Award Limit

- Project Term. This program is intended to support projects occurring during calendar year 2019.
- Project Location. Project or event must take place in the State of Hawai‘i.
- Award Limits. To ensure support for multiple projects, applicants may request an award of no more than \$30,000.

2.5

Brand Experience

The HTA has developed a marketing strategy to integrate the brand experience into the overall marketing strategy to help drive demand. As a part of this strategy, proposals must fall into one of the given tourism niche areas.

Agriculture Tourism: Tourism related to experiencing and appreciating agricultural products, settings, and lifestyles.

Cultural Tourism: Tourism related to Hawai‘i’s Native Hawaiian and multi-ethnic cultures that provide residents and visitors with enriching experiences and insights into the history, customs, arts, and traditions of our islands.

Nature Tourism: Tourism related to experiencing Hawai‘i’s natural attractions, unique flora, fauna, and culture in a manner which is ecologically responsible, economically sustainable, encourages the well-being of the community, and is infused with the spirit of *aloha ‘āina*.

Education Tourism: Tourism related to formal and informal education and training in life-long learning experiences in Hawai‘i’s unique natural and multi-cultural environment.

Health and Wellness Tourism: Tourism focused on travel to enhance the wellness of the mind, body, and spirit of individuals, families and groups.

Sports Tourism: Tourism focused on attracting participants or spectators in community-based sporting events, such as running, swimming, cycling, surfing, and paddling.

Technology Tourism: Tourism related to educating/informing visitors about Hawai‘i’s science and technology assets.

Voluntourism: Tourism related to travel to participate in voluntary work, typically for a charity.

2.6

Use of HTA Funds / Non-allowable Expenses

The following activities are **not** eligible for funding:

- a. Business or organizational start-up plans;
- b. Fundraising (an event to raise money for your organization or a specific cause);
- c. Litigation efforts;
- d. Endowments;
- e. Real Property;
- f. Capital improvements;
- g. Conferences/Conventions;
- h. Salaries and fringe benefits;
- i. Merchandising (HTA funds to purchase goods (e.g. T-shirts) which will be resold for a profit);
- j. Computer equipment;
- k. Projects receiving funding from other HTA programs for the year 2019, including, but not limited to, the Kūkulu Ola Program, Aloha ‘Āina Program, SIGI, and the Signature Events program;
- l. Projects relating to other niche areas than those specifically addressed by CEP;
- m. Reimbursement for pre-award expenditures or costs before January 1, 2019;
- n. Administrative costs outside of salary: Only up to ten percent (10%) of award money may be used for administrative costs.

2.7

Multiple Proposals and Other HTA Programs

- **Multiple Proposals to CEP.** Multiple proposals from an organization for ***different and separate projects*** will be accepted and considered independently of each other.
- **Applications to Other HTA Programs.** HTA solicits proposals for a variety of programs including Community Enrichment Program (CEP), Kūkulu Ola Program (Hawaiian Culture), Aloha ‘Āina Program (Natural Resources), and Signature Events. Information about our different programs can be found on the PROGRAMS page of the HTA website, www.hawaiiauthority.org. An applicant may not apply for funding from more than one (1) of those programs for the same project or event. In addition, a project may not receive funding from more than one (1) HTA program in the same year. The HTA reserves the right to disqualify an application from consideration under an HTA program if that project has been awarded funds under another HTA program.

Applicants with different and separate projects may apply to different programs respectively.

2.8

Matching Funds Requirement

A minimum of one-to-one (1:1) in matching funds to the amount of funds awarded 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 40% of the match must be in the form of cash.** (Example: If you are awarded \$20,000, you must be able to show \$20,000 in matching funds. Of those \$20,000, at least \$8,000 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 at least 20% matching funds in cash as a deliverable due for first payment, and the other 20% in cash as a deliverable due for final payment.**

Please see “Other Government Sources” in this section for limitations regarding the source of these matching funds.

2.9

Other Government Sources

You are encouraged to seek funding from other sources, including government sources. However, money received from other State sources (e.g. Office of Hawaiian Affairs (OHA)) and organizations supported by State funds (e.g. Hawai‘i Visitors & Convention Bureau (HVCB)) may not be counted towards your matching funds. This limitation does not apply to local, county, or federal funds.

The limitation stated above does not prohibit you from accepting funds from other 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 other State sources.

2.10

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.

2.11

Technical Assistance Programs

Applicants awarded funds through this RFP must agree to attend HTA mandated training workshops/seminars on the contracting process or other relevant topics.

2.12

Other Requirements

Please see “Section 3 – Contracting Process and Requirements” of this RFP for documents that were not required in the application process but that will be required for the contracting process. It is important that the applicant understand what will be required if they are awarded. Failure to meet these requirements in a timely manner will lead to the award being rescinded and the contract being cancelled.

2.13

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 Ma‘ema‘e Tool Kit available on the HTA website at <http://www.hawaiitourismauthority.org/programs/hawaiian-culture/maemae-program/>. This Tool Kit includes Hawaiian Language Tools and a Style & Resource Guide among other resources.

SECTION 3 – CONTRACTING PROCESS AND REQUIREMENTS

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

3.1

Award Letter

Awardees will receive a letter informing them of the next steps in the contract process and advising them of any documents that are due (e.g. Updated or Revised Budget, Certificate of Vendor Compliance, Certificate of Insurance.) The letter will include deadlines for receipt of these materials.

3.2

Timeliness

The CEP contract includes sponsorship and marketing requirements that must be fulfilled months prior to the event being supported. Therefore, the contract must be executed in time to fulfill these requirements. Executing the contract in time for the event will not be soon enough. Failure to meet specified deadlines could result in the award being rescinded and the contract being cancelled.

3.3

Contract for Services

This is not a grant. Awardees will be signing a contract. Simply put: A contract is a legally binding document that requires proof of services prior to 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. (See Payments and Deliverables below.) Contractor will not be reimbursed for receipts. Contractor will not be paid a lump sum.

The signed and notarized contract will be due by November 30, 2018. If the signed and notarized contract is not presented by November 30, 2018 the award may be rescinded. (See Contract Execution below for details on the execution process.)

3.4

Ownership

This is not a work for hire. The State/HTA will not have ownership of your event. Contractor will maintain ownership of their own event. HTA reserves the right to ask for proof of ownership of the event from the awardee.

3.5

Updated Budget

The award letter might ask for an updated budget if the applicant is awarded less than what was requested in their RFP proposal, or if there is a change in scope that needs to be reflected in the budget. If requested, an updated budget will need to be received before a contract can be executed.

3.6

Certificate of Vendor Compliance (CVC)

Contractor must have an active Hawai'i State Certificate of Vendor Compliance (CVC) in order 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>. We recommend that applicants begin the process early in order to identify any possible challenges and avoid any delays. There is a \$12 annual fee for this service. If compliance is not achieved by December 31, 2018, the award may be rescinded and the contract cancelled.

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>.

Note: Government agencies are exempt from the CVC requirement.

3.7

Commercial General Liability Insurance

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. If proof of insurance is not presented by contract execution, the award may be rescinded and the contract cancelled.

Note: Government agencies are exempt from the insurance requirement.

3.8

Contract Execution

The contract execution process consists of the following steps:

1. 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.
2. HTA signs the contract. Contract is sent to the attorney general's office.
3. Deputy attorney general approves the contract for form and signs. Contract is returned to HTA.
4. HTA makes copies of the contract and distributes as follows: HTA program manager, Contractor, Department of Accounting and General Services (DAGS).
5. 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.

The State of Hawai'i's fiscal year ends June 30, 2019. Any contracts not executed by that date will be voided.

3.9

Payments and Deliverables

A "deliverable" is what the contractor must deliver to the HTA in order to get paid. Examples of possible deliverables may be progress reports, updated budgets, pictures, 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 \$30,000, no less than \$3,000 of that will be held until the final payment.)

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 and on the certificate of vendor compliance, including any punctuations, entity type, and dba's. 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.

3.10

Technical Assistance Training and Orientation

Contractors will be required to attend mandated training workshops/seminars on the contracting process or other relevant topics

3.11

Visual Documentation

Copies of all advertising and promotional materials and a minimum of fifty (50) high resolution digital photographs (minimum 300dpi) or other medium, submitted on a CD, DVD and/or as downloadable items from a cloud source, 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. A sample Release Form is available as an Exhibit to this solicitation.

3.12

Summary Write-up and Photos

If funded, the grantee must provide a 500-word article describing the project scope and benefits with accompanying high-resolution pictures suitable for publication in the HTA newsletter, HTA's marketing contractors' newsletter or other news media. The article will be due three months before the start of your event, or for year-long programs within thirty (30) days of contract execution.

3.13

Sponsorship Recognition

The HTA shall be credited as a sponsor in all advertising and promotional materials and activities.

3.14

Promotional / Outreach Programs

Contractors shall implement initiatives to promote their project through direct signage, leaflets, flyers, collateral material, social media, and/or other promotional initiatives. Contractors under this program shall consult with the HTA's marketing contractors and staff to coordinate marketing efforts as appropriate. Contractors under this program may be selected to participate in HTA's "Hawai'i Knowledge Bank" program.

3.15**Evaluation of Program.**

Contractors under this program shall provide full access for up to 4 HTA staff or their designee to review and monitor the project for evaluation purposes. The success of the project will be determined based on both qualitative and quantitative criteria, with the quantitative criterion measured against the KPI numbers submitted in response to the RFP.

3.16**Reporting Requirements.**

Contractors under this program shall submit a Key Performance Indicator (KPI) report, progress report, a final report, and a final financial report. Contractor may also be asked to submit interim reports as may be necessary.

3.17**2019 HTA Global Tourism Summit.**

Contractors are urged to attend the 2019 Global Tourism Summit to be held at the Hawai'i Convention Center, Fall 2019.

SECTION 4 – PROPOSAL OUTLINE AND INSTRUCTIONS

4.1

Submission Method

Delivery of the Proposal Electronically Only (NO PAPER DOCUMENTS)

Each Applicant is required to deliver a proposal in electronic format to the point-of-contact identified in Section 1 of this RFP, 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 labeled to read: **“RFP 19-01 Form [Letter of Form] – [Name of Event]”**. Example: RFP 19-01 Form B – Flower Day Parade. (See Section V for information on Forms.) Front cover page of proposal should clearly state the names of the Project or Event, and the Applicant.

All proposals are to be delivered as no more than two (2) electronic documents. Document 1 should include Forms A, B, C, D. Document 2 may include other allowable and/or required attachments listed in 4.4. Applicant can merge the completed Forms together if they have the software to do so, or they can print the completed Forms and scan them together. Either method is acceptable. If printing, please double-check to be sure that all of the text that was inputted in the box shows up. HTA highly recommends saving all your text in a separate Word document in case there is an error with the fillable forms.

4.2

Submission Deadline

The deadline for submission is listed in the Timeline in Section 1 of this RFP. 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 that are unavailable at deadline, or when the point-of-contact attempts to access the file, 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.

4.3

Confirmation of Receipt

All applicants will receive an email confirming receipt of submission. However, those who submit on Friday, August 3 will not receive confirmation until the following Monday, August 6 (3 days after the deadline). For peace of mind, we highly recommend submitting your proposal before Friday August 3.

If you do not receive confirmation of your submission by the Tuesday after the deadline, please email the point-of-contact identified in Section 1 of this RFP. Please do not ask for confirmation prior to the Tuesday after the deadline.

If you have submitted your proposal prior to the deadline and are unsure that your submission has gone through, please feel free to submit a second time or to choose a second and alternate approved form of submission. If you are resubmitting, please indicate in your email that this is a resubmission.

Again, those who submit proposals the day before the deadline will receive confirmation prior to the actual deadline.

4.4

Proposal Contents

The Proposal will consist of four forms and their respective attachments, described below and included in the Forms section of this RFP. Fillable versions of these forms are available on the website at <http://www.hawaiitourismauthority.org/rfps> . Requested attachments, when necessary, will be specified at the end of each form.

Complete and return the following forms in the following order .:

- ☐ Form A: Applicant Information Form
- ☐ Form B: Proposal Form
- ☐ Form C: Itemized Budget Form
- ☐ Form D: Budget Narrative Form
- ☐ Attachments (any attachments not included on this list will be discarded)
 - ☐ List of the Applicant's current Board of Directors if applicable, and/or leadership including names, titles and affiliations;
 - ☐ Applicant's articles of incorporation (preferred), or by-laws, or other documentation to verify the person(s) authorized to sign legal documents on behalf of the organization;
 - ☐ W9
 - ☐ Letters of Recommendation

Please be aware that the forms for the Community Enrichment Program are different from the forms for the Kūkulu Ola and Aloha 'Āina Programs.

4.5

Description of Forms

Forms A, B, C, and D are not online forms. Applicant will need to download the blank forms to their computer from the HTA website. Once downloaded, the forms can be saved and filled in. Remember to always save your work. Once completed, you can send the form as an email attachment.

The fillable Word doc does not accept bullets or indents. A facsimile of a bullet can be created by typing a star (*) followed by a space and the text.

Each question or box has a character limit. When you run out of characters the text will stop, regardless of how much room there might still be left in the box.

To check character count, we recommend copying and pasting into <https://charactercounttool.com/> . This tool will give the character count with and without spaces. If the count reported from this website is less than the count allowed in the text box but you are still not allowed to type any more, please email us at contracting@gohta.net so that we can diagnose the problem.

Other fillable form tips:

- Our recommendation is to merge your text as one paragraph, copy and paste, then break up into paragraphs it's been pasted into the form.
- Do not try to copy and paste within the text box.
- What's important to us is that the information you are providing to us appears in the box correctly and within character limits.

4.6

Form A – Applicant Information Form:

- Form A must be printed then signed by a person authorized to bind your organization. Proposals will not be accepted without an authorized signature.
- Web address: Evaluators may access your website or other link to view pictures, videos, collateral material, or other matter. We are not accepting attachments of photos or collateral. Please do not attach any material not specifically requested in this RFP. Unauthorized material will be deleted prior to review by the evaluators, or the submission may be disqualified all together.
- Primary RFP Contact: The person listed here will be your contact regarding any updates to the RFP process and any questions regarding your submission, as well as any award or debriefing notices. This will be our one and only point of contact during the RFP phase.
- Primary Project Contact: The person listed here will be your post-award contact during the contract phase.
- Promotional Contact: The person listed here will be the person we list on promotional materials for people interested in getting more information.

4.7

Form B – Proposal Form:

- For CEP, please be sure to use the Form B created specifically for CEP.
- This is a fillable form with a character count. We will accept proposals submitted in this approved form only. Proposals submitted in any other format will be rejected as nonresponsive and will not be reviewed by the evaluation committee.
- Each question has a character limit. These limits are absolute and apply to everybody. We will not accept any additional or “see attached” pages to supplement your answers. Past applicants have been disqualified for such attempts.
- Section B. Project Impact: We are asking applicants to fill in as many blanks as possible. If actual figures for 2018 are not yet available, completed figures for 2017 are acceptable. If you are a new event and don't have any past figures, you can still apply. However, in the absence of past figures, the evaluators will be reviewing your capacity and your plan as a determination of your ability to deliver as promised.
- We have attached, as an exhibit to this RFP, a list of KPI Definitions (Media Metrics). There are various tools available for you to quantify your accomplishments. You can find a Tool Kit tab on the HTA website which includes, among other things, a sample of a Festival and Events Survey: www.hawaiiourismauthority.org/tool-kit/.

4.8

Form C – Itemized Budget Form

- The Project and Applicant spaces at the top of the form exactly match those on Form A.
- An Excel spreadsheet is provided on our website as a template. Please add rows and reword as needed to provide a complete picture of the project budget.
- Total Expenses and Total Income in each column should be equal. (e.g. Total Expenses to be covered by HTA CEP financial support (a) should equal Total Income from HTA CEP requested (a).)
- The sum of columns (c), (d), and (d) must equal column (f).
- 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, Community Enrichment Program 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, liability insurance, office management, auditing, human resources, and other centralized services. (Note: liability insurance, if claimed, must be placed under Administrative and cannot be placed under any other category.) **No more than ten percent (10%) of the CEP award money may be allocated to the administrative expenses.**
- Determining In-Kind Costs: The Hawai'i Department of Human Resource Development (DHRD) publishes salary schedules. These schedules are broken down into Bargaining Units (BU). We recommend pulling up the "Classification Specification and Minimum Qualification Requirements" document, which can be found here: <http://dhrd.hawaii.gov/state-hr-professionals/class-and-comp/>. Look through the jobs list in the "Classification" spreadsheet to find the job closest to the one you are assigning the volunteer. (If you are not sure, you can click on the link in the "Class Specifications" column of the spreadsheet to see a job description.) To see the salary schedule for that job, click on the link in the "BU Salary Schedule" column of the spreadsheet. This will take you to the salary schedule for that job. The Salary Schedule will show you all the wages for that Bargaining Unit (BU). The unit will be further broken down into classes. (Example: BC01, BC02, etc.) When in doubt, go with the lowest classification.
- 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. **A minimum of forty percent (40%) of the match must be in the form of cash.** The remaining match may be in cash or as in-kind.
- Change from last year: HTA will no longer be reimbursing expenses to attend the Global Tourism Summit. Awardees will, instead, be offered a discounted rate. The Summit should not be included in your project budget.

4.9

Form D – Budget Narrative Form

- The Project and Applicant spaces at the top of the form exactly match those on Form A.
- This is a simple fillable Word doc with a 5000-character limit.
- This form presents an opportunity to explain the expenses outlined in the Itemized Budget Form. The evaluators will want to know exactly how the money is being spent.

4.10

Attachments

- Any letters of recommendation must be included with the proposal and submitted by the proposal deadline. We will not be accepting recommendation letters after the deadline has passed. Nor will we be accepting recommendation letters directly from the party writing the letter.
- Please do not include any attachments that are not already listed here. Please do not attach pictures, brochures, slide decks, or any other collateral material. Evaluators will have access to the web address listed in Form A. Any unauthorized attachments will be deleted, and may lead to disqualification.

SECTION 5 – SCORING / EVALUATION CRITERIA

5.1

Evaluation Committee

Proposals will be evaluated by a Committee whose members are selected by the HTA and include representatives of the HTA as well as community and business representatives throughout the state. 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. Evaluators will then be assigned an alternate applicant to evaluate.

5.2

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 does not have a vote. However, in the event that an application has fewer than three scoresheets, and if no other evaluators are available to review the application, the Procurement Officer will automatically be assigned a scoresheet.

5.3

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. 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 and the designated county tourism specialist listed in Section 1 of this RFP.

5.4

Prequalification

In addition to meeting the requirements of the RFP, the proposal must pass a threshold judgement of whether it fills the needs of the Community Enrichment Program. If the proposal is judged to be inappropriate for, or a bad fit for, CEP, it may be put aside as nonresponsive. This judgement may be made prior to scoring either by HTA management or by the evaluators themselves. Applicants are encouraged to contact their designated County Tourism Specialist, listed in Section 1 of this RFP, for guidance.

5.5

Evaluation / Award Process

There is no minimum or maximum number of awards to be granted for this RFP. At the conclusion of the evaluation process, the Evaluation Committee will rank the proposals based on which ones they determine are most advantageous to the STATE, to the Island where the project/event is scheduled to take place, to the surrounding community, and to the HTA's mission. The Evaluation Committee will then make recommendations to the HTA regarding who should be awarded and how much they should

be awarded (within the parameters of the program). The HTA President and CEO will make the final determinations.

The evaluation committee reserves the right, at any time prior to award recommendation, to request selected applicants to provide an oral presentation in support of their application.

Once the recommendation to award is approved by the HTA President and CEO, a final contract will be executed by both parties.

5.6

Written Submission Only

The HTA anticipates awarding based on written submission only. However, HTA reserves the right to request additional information or materials, conduct oral interviews, conduct reference checks, negotiate key provisions of the statement of work, and/or ask for a best and final offer (BAFO), upon request from the evaluation committee or from HTA management.

5.7

Scoring Criteria

Proposals will be evaluated based on the following scoring criteria:

- 50% Project Components (Form B)
- 20% Project Impact (Form B)
- 10% Organizational Capacity (Form B)
- 20% Project Budget (Forms C & D)

A facsimile of the scoring worksheet to be used by the evaluators follows on the next page.

5.8
Scoring Worksheet

**Evaluator Scoring
Worksheet
RFP 19-01**

EVALUATION OF PROPOSAL	Scoring Range	Evaluator Score
Project Components (Form B) <ul style="list-style-type: none"> • Meets CEP goals and objectives • New Project – development of new experiences that have not been offered by others more generally. • Enhancement of Existing Project – demonstrates enhancement and/or innovation of existing project or event to better the experience for the attendee. • Ongoing experiences available year-round. • Shoulder Season (Spring or Fall shoulder) • Executable Marketing & Promotional Plan – shows 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. • Work Plan and Time – work plan and timeline appears reasonable to execute the event/program. • 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. 	1-50	
Project Impact (Form B) 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.	1-20	
Organization Capacity (Form B) Ability to produce, implement, and execute the project. Has established network. Demonstrated success and expertise necessary to perform the project described. Past performance with HTA/County Product Enrichment Program.	1-10	
Project Budget (Forms C & D) <ul style="list-style-type: none"> • Demonstrates organizational financial capability. • An accurate and feasible budget for the project. • Valid sources of revenue. • Reasonableness of estimated expenses comparable to similar event/activity. • A minimum of 1:1 match or better on requested funds, with at least 40% of the match in other cash. 	1-20	
TOTAL SCORE	4-100	

5.9

Scoring Guidelines

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. Award Amounts. Award amounts are determined based on the applicant's request, the average evaluator score, the overall score ranking, and the collective agreement of the evaluators regarding what is in the best interests of the State.
7. 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.

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 6 – 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 holding pre-proposal information sessions as noted in the Procurement Timeline. A schedule of times and locations are included as an attachment to this RFP.

6. Submission of Written Questions

- (a) Written Questions. HTA welcomes written questions from applicants in order 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 of the point-of-contact identified in Section I of this RFP. To expedite responses, applicants are asked to submit questions on a Microsoft Word document. Each question must cite the RFP

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. Questions and answers will be documented in an Addendum to the RFP. The addendum will be posted on the RFP web page and will be and will be emailed directly to those who have registered per the instructions in Section 1 of the RFP.

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 the Proposal Outline section of this RFP. Video, audio, or other similar multimedia materials will not be accepted as part of the submission, but applicants are welcome to include a website address which evaluation committee members may or may not access at their own discretion.
- (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 will, 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 in order 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.
- (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 requirements, or failure to supply an adequate 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 the best interests of the STATE.
- (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 may be subject to disclosure under Hawai'i Uniform Information Practices Act provided in chapter 92F, Hawai'i Revised Statutes.

13. Opening and Storage of Proposals

Proposals will be time-stamped based on the email signature if submitted electronically, or as stamped by HTA reception if submitted physically. Submission will be maintained in an electronic file by HTA.

14. Public Inspection

Procurement files, including proposals, will be open to public inspection in accordance with the Uniform Information Practices Act (UIPA) and 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 (if applicable)

- (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. An award letter will be sent to the selected applicant/s. The letter will introduce the awardee to their HTA manager and provide information regarding next steps, including a list of any outstanding documentation needed.
- (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. The designated HTA manager will work with the awardee to draft a Statement of Work based on the winning proposal to be incorporated into the contract or agreement. The contract needs to be signed and notarized by the awardee, signed by HTA, and approved by the attorney general's office. Once the contract is executed, the selected applicant/awardee 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. Any request for confidentiality is subject to review by STATE regarding applicability of the request to State law. 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 information labelled as confidential commercial or proprietary information may be withheld subject to review by STATE regarding applicability of the request to State 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. Contractor is also responsible for obtaining any and all required permits and licenses. 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 will set a not-to-exceed amount for goods and services under this contract based on contractor proposal and subsequent negotiations. The contractor must not exceed that limit without the express written consent of the HTA delivered via a supplemental to the contract.
- (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. 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.
- (f) Termination. During the term of the contract awarded pursuant to this RFP solicitation, 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.
- (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 President and Chief Executive Officer.
- (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. Email signature, postmark, or date stamp must be 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 Executive Officer:	George Szigeti
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

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 facsimile or email (in lieu of letters by mail) for all matters regarding this RFP solicitation after receipt of Proposals. HTA will use the facsimile number and the email address provided by the applicant on the Applicant Interest Form (Form A). If the HTA sends letters via facsimile machine or email, 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 – RFP Informational Sessions / CEP, Kūkulu Ola, Aloha `Āina

Informational sessions will be held to provide individuals and organizations with further information on the RFP application and award process for each program:

Maui	<u>Thursday, June 21 / 9:30 a.m. – 11:30 a.m.</u> Maui Arts and Culture Center Alexa Higashi Meeting Room 1 Cameron Way, Kahului, HI 96732
Kauaʻi	<u>Friday, June 22 / 9:30 a.m. – 11:30 a.m.</u> Kauaʻi County, Piʻikoi Building Room A & B 4444 Rice Street, Suite # 330, Līhuʻe, HI 96766
Oʻahu	<u>Friday, June 22 / 3:00 p.m.- 5:00 p.m.</u> Hawaiʻi Convention Center , Room # 320 1801 Kalakaua Ave, Honolulu, HI 96815
Molokaʻi	<u>Tuesday, June 26 / 9:30 a.m. – 11:30 a.m.</u> Kūlana ʻŌiwi Hālau DHHL / OHA Conference Room 600 Maunaloa Highway, Kaunakakai, HI 96748
Hawaiʻi	Kailua-Kona: <u>Wednesday, June 27 / 10:00 a.m. - 12:00 p.m.</u> County of Hawaiʻi Council Chambers, West Hawaiʻi Civic Center Council Conference Room - Building A 74-5044 Ane Keohokalole Highway, Kailua-Kona, HI 96740 Hilo: <u>Wednesday, June 27 / 2:30 p.m. - 4:30 p.m.</u> County of Hawaiʻi, Aupuni Center Conference Room 101 Pauahi Street, Hilo, HI 96720
Lānaʻi	<u>Friday, June 29 / 10:00 a.m. – 12:00 p.m.</u> Lānaʻi Heritage Center Room # 126 730 Lanai Ave, Lanai City, HI 96763

EXHIBIT 2 – KPI Definitions

Key Performance Indicators (KPIs): Provided by Applicant. If HTA funds are used for marketing activities, please identify the respective KPIs. Visitor and resident attendance and attendee satisfaction are mandatory KPIs.

(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: Story word count. Key word 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 specific 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:

1. Unique visitors
2. Average site duration
3. 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. Total Impressions Gained
2. Total Fan Count
3. Increase in Fans
4. Total Posts
5. Total Engagement