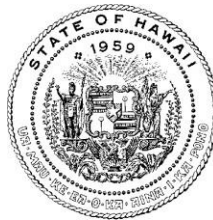




**REQUEST FOR PROPOSALS**  
**for**  
**HAWAII TOURISM INBOUND DESTINATION**  
**MARKETING MANAGEMENT SERVICES IN**  
**THE EUROPE MAJOR MARKET AREA**

**RFP NO. 21-04**



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

Date of Issuance: March 24, 2020

Procurement Officer/Contract Manager:

Mr. Ronald D. Rodriguez

**DEADLINE FOR RECEIPT OF PROPOSALS:**

**Friday, May 29, 2020 by 4:30 pm, HST**

**Submission of proposal will be accepted via eCivis Portal ONLY**

See Section 3 of RFP for submission details

**RFP 21-04**

**INBOUND DESTINATION MARKETING MANAGEMENT SERVICES**

**IN THE EUROPE MAJOR MARKET AREA**

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## SECTION 1 – INTRODUCTION

### 1.01 Introduction

The Hawai'i Tourism Authority, hereinafter referred to as the "Authority" or "HTA," is issuing this request for proposals (RFP) to seek inbound destination marketing management companies capable of providing a full range of comprehensive marketing management services for the Hawaiian Islands in the European market. The destination marketing management services being solicited include:

- Develop and deploy a brand management plan that will increase visitor expenditures for the Hawaiian Islands in alignment with HTA's strategic directives;
- Integrate activities with the travel trade (retail and wholesale) and consumers through multi-faceted, traditional and non-traditional means;
- Develop and facilitate partnerships or other relationships with Hawai'i's visitor industry and community stakeholders; and,

Hawai'i Tourism Authority is a government agency established by the State of Hawai'i in 1998, pursuant to Chapter 201B of the Hawai'i Revised Statutes, 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. See EXHIBIT A: HTA Website References of this RFP for more information about HTA's mission and strategic plan.

As part of its marketing capacity, the Hawai'i Tourism Authority manages branding initiatives and activities through its contractors, who leverage HTA funds by way of direct marketing, partnerships and other relationships.

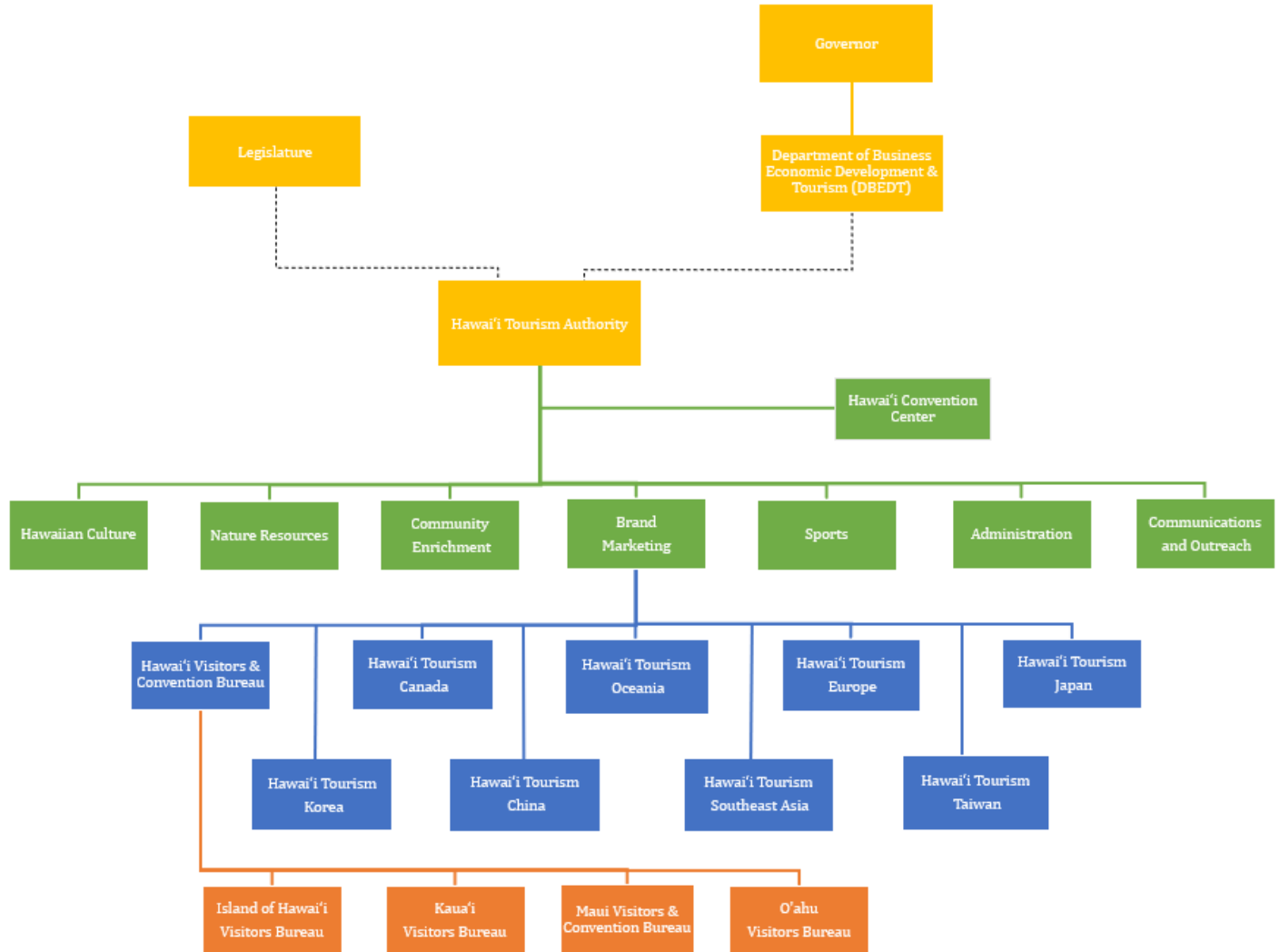
### 1.02 Brand Management at Work

Brand management is one of the HTA's key strategic roles. Specifically, it involves the promotion of the Hawaiian Islands through HTA's support of programs and events that deliver on the brand promise. The HTA coordinates with its global marketing contractors, visitor industry partners, travel trade, MCI partners, and community stakeholders to ensure that marketing and communications tactics are in line with Hawai'i's unique and distinctive products, including natural resources, Hawaiian culture, and Hawai'i's multi-ethnic culture.

The HTA currently contracts with nine marketing organizations worldwide in the USA, Canada, Oceania, Europe, Japan, Korea, China, Taiwan, and Southeast Asia to promote Hawai'i in each '**Major Market Area**' (to be abbreviated as **MMA** in the rest of this document). With direct HTA oversight, the marketing contractors are responsible for developing strategic brand management plans for their respective major market area.

In addition, the HTA creates, manages and supports the development of unique tourism experiences such as community and cultural festivals, sporting events, natural resources, and community and cultural programs. The HTA also directly affects the visitor experience through its support of career development, visitor assistance programs, the integration of community and residents' considerations, and a deep respect for the Hawaiian host culture. All should be considered as RFP responses are developed.

### 1.03 Functional Organization Chart of the HTA



## 1.04 Hawai'i's Tourism Economy

As Hawai'i's main economic driver, tourism is expected to provide economic benefits for Hawai'i's people into the foreseeable future. In 2019, the industry sustained 216,000 jobs and generated more than \$17.75 billion in visitor spending and \$2.07 billion in tax revenues.

Tourism is the fabric that knits together jobs and income for residents, access to and from the rest of the world, and attributes of the islands - our culture, climate, natural resources, and a worldwide reputation for hospitality and aloha - that are prized by visitors and residents alike.

## 1.05 HTA Funding

The legislative act that created the HTA also established the Tourism Special Fund (TSF) which is the sole source of funding to support the Authority. The TSF receives its funding from the transient accommodations tax (TAT) assessed on hotels, condominiums, timeshares, vacation rentals, and other visitor accommodations. The fund was designated for use by the HTA to market, develop and support Hawai'i's economy.

Currently, the HTA budget is determined by the Hawai'i State Legislature and approved annually by the HTA's board of directors. The HTA also manages the Convention Center Enterprise Special Fund, which also is funded by a portion of TAT collections.

For additional information on Tourism Economic Impact, see EXHIBIT A: HTA Website References – HTA Economic Impact Fact Sheet.

## 1.06 HTA Visitor Data

### Europe Market

	2018	2019
<b>Total Expenditures (in Millions)</b>	<b>326.3</b>	<b>274.1</b>
<b>PPPD\$</b>	<b>171.5</b>	<b>153.2</b>
<b>Total Arrivals</b>	<b>144,953</b>	<b>138,550</b>
<b>LOS</b>	<b>13.12</b>	<b>12.92</b>
<b>Days</b>	<b>1,902,379</b>	<b>1,789,549</b>

### Terminology

- (a) **Total Expenditures** – the U.S. dollar amount spent in Hawai'i attributed to a visitor. Includes direct spending by visitors while in Hawai'i as well as any prepaid package purchased before arrival. Does not include transpacific air costs to and from Hawai'i, commissions paid to travel agents or portions of the package in another state or country.

- (b) **Per Person Per Day Spending (PPPD\$)** – the average dollars (US) spent per day – per person – in Hawaii by visitors from the market.
- (c) **Total Arrivals** – the total number of visitors that arrive from the market.
- (d) **MCI Arrivals** – the number of visitors that arrive from the market to attend meetings, conventions, and incentives (MCI).
- (e) **Length of Stay (LOS)** – the average number of days a visitor from the market stays in Hawai'i.
- (f) **Days** – the total visitor days from the market.



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## SECTION 2 – OVERVIEW AND TIMELINE

### 2.01 Scope of Work

The Hawai'i Tourism Authority (HTA) is soliciting proposals from qualified marketing organizations to provide Inbound Destination Marketing Management Services for the Hawaiian Islands.

### 2.02 Applicant Qualifications

This RFP is open to in-state and out-of-state applicants. Applicants must include evidence that they currently possess or have filed for a Certificate of Vendor Compliance (CVC). This is a requirement. See Section 3 of this RFP for CVC application details.

For a list of reasons why a proposal may be rejected, regardless of applicant eligibility, please see Section 3 of this RFP.

### 2.03 Registration

Interested applicants are encouraged to register for updates. This is done by creating an account and filling out “My Profile” on eCivis. See Section 3 of this RFP for eCivis instructions. HTA will not be accepting requests via other methods.

Those who have registered by the registration deadline will receive notice of changes and addendums directly to their email. Addendums will also be posted on the eCivis portal. All dates and times are in Hawai'i Standard Time.

Once registration is completed, the profile will be available for use by the applicant in future RFP applications.

### 2.04 Procurement Timeline

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

<b>RFP 21-04 Europe Hawai'i Tourism Inbound Destination Marketing Management Services</b>	
<b>ACTIVITIES</b>	<b>SCHEDULED DATE</b>
Distribution of RFP	Tuesday, March 24, 2020
Deadline to submit written questions to HTA. Recommended due date to register on eCivis.	Monday, April 6, 2020
RFP Addendum - HTA to Issue Responses to Written Questions.	Week of April 13, 2020
Deadline for Applicants to Protest the Content of the RFP.	Within 5 calendar days of issuance of Addendum with an answer to questions
<b>Deadline to Submit Written Proposal</b>	<b>Friday, May 29, 2020 (by 4:30 pm HST)</b>

Notice of Selection or Non-selection to Oral Presentation	Week of June 22, 2020
Oral Presentation	Week of July 6, 2020
Notice of Award Selection or Non-selection	Mid July
Deadline for Applicant to Protest Non-Award	Within 5 business days of notice of non-award
Start of Initial Contract Period	January 1, 2021
End of Contract Performance	December 31, 2023
End of initial Contract Period	March 31, 2024

## 2.05 Websites

Exhibit A of this RFP includes a table of websites referenced throughout this RFP.

## 2.06 Agency Authorization

The 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 to engage the services of qualified persons to implement the STATE's tourism marketing plan or portions thereof as determined by the Authority under 201B- 3(a)(10) HRS. Under 201B-7(a)(1) HRS, HTA may enter into contracts and agreements for tourism promotion, marketing, and development.

HTA procurement is not subject to the Hawai'i Public Procurement Code codified under HRS Chapter 103D and the administrative rules promulgated there under ("Hawai'i Procurement Code"). However, the HTA may consider Hawai'i procurement practices as guidance.

## 2.07 RFP Point-of-Contact

Applicants to this RFP are to communicate only with the points of contact listed below. HTA is not responsible for misinformation or reliance from other sources. Email is the preferred mode of communication. Please include RFP number in the subject line of emails. Unless otherwise specified in a written Addendum to the RFP, the points-of-contact for this RFP are:

Ronald D. Rodriguez, Contract Specialist / Procurement Officer  
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](mailto:contracting@gohta.net)  
Phone: (808) 973-9449

## 2.08 eCivis Support

The HTA is using an online RFP management system this year called eCivis. For technical problems with the eCivis system, please email [support@eCivis.com](mailto:support@eCivis.com) . This is for technical problems only.

Applicants can also access an Application Submission Guide <https://bit.ly/2J1BMUi> and instructional video <https://bit.ly/2ZNBx5a>.

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## SECTION 3 – PROPOSAL SUBMISSION REQUIREMENTS

This section outlines the procedural requirements for submission. Proposal contents will be covered in Section 4 and in the Appendices.

### 3.01 Certificate of Vendor Compliance (CVC)

HTA is requiring all applicants to produce evidence that they currently possess, or have filed for, a Hawai'i State Certificate of Vendor Compliance (CVC). Per State law, once awarded, all contractors must have a "compliant" CVC as a precondition to signing a contract. Contract cannot be executed without a CVC.

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>.

Your certificate will show the compliance status of each of the four agencies. The status will show as either "Submitted," "Compliant," "Exempt," or "Not Compliant." "Submitted" means we are waiting for a judgement from that agency. "Compliant" and "Exempt" mean that no further action is needed from you. "Not Compliant" usually means that you will need to correct something. Contact information for the different agencies can be found at the "Contact Information" link that appears on the left hand side of the Hawai'i Compliance Express webpage. HTA has no control over your compliance status under other agencies.

We recommend that applicants begin the process immediately to identify any possible challenges and to avoid any delays in processing. 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 the name or tax ID. Government agencies are exempt from the CVC requirement.

### 3.02 Applying for an FEIN Number

Hawai'i Compliance Express requires entities to have a Federal Tax ID number (FEIN) in order to apply for CVC. This is true for foreign entities as well as domestic. Applicants can get an FEIN, by filling out IRS Form SS-4.

- Go to the Taxpayer Identification Numbers (TIN) page of the IRS website by going to the following link: <https://www.irs.gov/individuals/international-taxpayers/taxpayer-identification-numbers-tin>
- Scroll down to the paragraph entitled "Foreign Persons and IRS Employer Identification Numbers."
- Click on the link in the paragraph entitled "Form SS-4 Application for Employer Identification Number". This will take you to the "About Form SS-4, Application for Employer Identification Number" page.
- The "About Form SS-4, Application for Employer Identification Number" page includes a link to "Form SS-4" as well as to "Instructions for Form SS-4."

### 3.03 Submission Method

HTA will accept submission via the eCivis online portal only. NO PAPER SUBMISSIONS. NO EMAILED SUBMISSIONS. NO FAX SUBMISSIONS. Please access through Chrome, Firefox, or Internet Explorer. Do not use Safari, Opera, or Edge.

- 1) Click on the link <http://bit.ly/HTAecivis>
- 2) Choose RFP 21-04 from the list. Click on it.
- 3) Click on the “Apply” button.
- 4) Click on “Create an account.”
- 5) Fill in the basic information and click “Sign Up”. You should receive a confirmation email.
- 6) Click on the link in the confirmation email.
- 7) Sign in. You will need to type in your login and password again.
- 8) See the menu on the left-hand column. Click “My Profile”. Fill out a profile. (No need to fill in the DUNS. For Congressional District type Hawai‘i.) If you click the wrong button you will not be able to log in. See the menu on the left-hand column. Click “My Profile.” Fill out profile.
  - i) First Name
  - ii) Last Name
  - iii) State DUNS: Leave blank or enter all zeroes
  - iv) Address: Physical address
  - v) Address 2: Mailing address
  - vi) Congressional District/Region: Input the word Hawai‘i
- 9) Note: There is a second login that you will need to complete once inside the Portal to access the Grant Application. Same as above.

***Warning:** If you proceed to “My Application” before you fill in “My Profile,” your application will not save and you will need to start over.*

Other Tips for eCivis:

- a) When logging back into the system you will be given a choice of “Portal” or “eCivis” login. Please choose the **Portal** login.
- b) eCivis accepts only one unique user and password per application. Do not try to fill out the application online using multiple usernames. If you have multiple people working on the application, our advice is to create your answers in a separate word document and have one person copy and paste the answers into the template on eCivis.
- c) Note: eCivis refers to your proposal as a “grant” application. What you are applying for is actually a contract, not a grant. “Grant” is just the term used by the management system.
- d) The space for phone number might be formatted as a numeral with commas rather than as a phone number with dashes. That’s okay for our purposes. Please just enter your number and do not worry about the dashes or commas.
- e) You must SUBMIT your application in order for it to be received. You will receive an email confirmation immediately after the application is successfully submitted. If you do not receive an email confirmation then your application has probably not been submitted successfully. HTA will not accept applications unless they have been submitted and received.

### 3.04 IP Addresses and VPN

Some applicants will have trouble accessing eCivis because of their Internet Protocol address (IP address). An IP address is a number assigned to your computer when it connects to the internet. The IP address identifies you and your location. Sometimes, if you are located in a geographic area that is considered an

internet security risk, the portal may block that IP address and you will not be allowed to log in. You may have this problem if you are located outside the United States. It can even happen in remote locations in the US. (We have reason to believe that Kaua'i may be one of these remote locations.)

If you have this problem, you can use a virtual private network (VPN) to make it look like you are in the continental US instead of in a foreign country—that way you won't be blocked. This is very easy to do. HTA does not want to recommend any particular service, but we have seen good results from ExpressVPN and proVPN. You can find reputable VPN providers at this link: <https://www.cnet.com/news/best-vpn-services-2020-directory/>.

If you continue to have challenges, please email eCivis at [support@eCivis.com](mailto:support@eCivis.com).

### 3.05 Submission of Questions

Applicants may submit written questions to **[contracting@gohta.net](mailto:contracting@gohta.net)** by the date specified in the timeline that appears in Section 2 of this RFP or as may be otherwise amended.

- 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 to the email address of the HTA Procurement Officer identified in this RFP. To expedite responses, applicants are asked to submit questions in a Microsoft Word document. Each question should cite the section/paragraph number that is the source of the question. HTA will respond to written questions as discussed below.
- b) **Deadline.** Deadline for submission of written questions is listed in the timeline in Section 2.
- c) **Responses.** The HTA Procurement Officer will combine the questions from all applicants into a single list. Related questions may be combined and responded to as a single question. Questions will be published anonymously, along with HTA's answers, in an RFP Addendum. The HTA will act in good faith in providing responses but may decide, in its sole discretion, not to respond to some questions. HTA may also reword questions for relevance. The Addendum will be provided to all eCivis applicants and posted on HTA's website.

### 3.06 Submission Deadline and Confirmation of Receipt

The deadline for submission is listed in the Timeline in Section 2 of this RFP. The eCivis website will automatically confirm receipt of your proposal. The eCivis management system will discontinue acceptance of submissions at deadline. Applicants who wait until the last minute to submit their proposals do so at their own risk.

### 3.07 Multiple or Alternate Proposals Not Allowed

Multiple or alternate proposals from the same applicant 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.

### 3.08 Rejection of Proposals

- 1) **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.

- 2) Changing Terms: Any proposal requiring any contract terms or conditions contradictory to those included in this RFP and any of its attachments—including the State’s General Conditions as amended in this RFP—may be rejected in its entirety without further notice. The General Conditions are available for download from the eCivis portal. The amendments to the General Conditions are identified in the Exhibit to this RFP entitled “HTA
- 3) Amendments to the General Conditions”
- 4) Reasons: A proposal may be automatically rejected for the following reasons:
  - a) Failure to cooperate or deal in good faith;
  - b) Late proposals;
  - c) Lack of a Certificate of Vendor Compliance (CVC)
  - d) Failure to submit in accordance with the RFP requirements, or failure to supply an adequate response to the RFP;
  - e) Refusal to abide by the State of Hawai‘i’s General Conditions as amended in this RFP by the HTA;
  - f) Lack of demonstrated experience or expertise;
  - g) Inadequate accounting system or internal controls;
  - h) Failure to meet the terms of agreement on any previous HTA contract;
  - i) 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.
- 5) Waiver: 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.

### 3.09 Public Records and Public Disclosure

- a) RFP Submittals Become the Property of HTA. All Proposals and other materials submitted shall become the property of the HTA for the State’s records.
- b) Management Contract. All or part of the RFP and the selected applicant’s response to the RFP may, by reference, become a part of the final Management Contract between the selected applicant and the Authority resulting from this solicitation process.
- c) Public Disclosure. 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 be subject to disclosure.

### 3.10 Conflicts of Interest Disclosure

Applicant will be required to fill out and sign a Conflicts of Interest Disclosures and Attestations Form which is available for download on the eCivis portal. See Section 4 for details.

### 3.11 Expenses

Each applicant is solely responsible for all expenses incurred for the preparation of the proposal and any expenses related to the evaluation process. This includes, but is not limited to, development and submission of the Proposal and subsequent responses to HTA requests for more information, and participation in any pre-award oral presentation, including travel and lodging expenses. An applicant shall 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.

### 3.12 Disclaimer: Cancellation

HTA reserves the right to cancel all or 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.

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## SECTION 4 – FIXED PRICE AND PROPOSAL STRUCTURE

### 4.01 Fixed Price

An Applicant shall submit a Fixed Price Proposal. This is a firm fixed price contract for *no greater than* four hundred thousand dollars (USD \$400,000.00), tax inclusive, for Calendar Year 2021. The total amount is subject to change. The fixed price is inclusive of all aspects of the contract. Staffing and office expenses, exclusive of contractor profit/retainer, must be included in the fixed amount and may not exceed twenty-six percent (26%) of the total fixed price. Contractor profit/retainer must be included in the fixed amount but should not be accounted for within the staffing and office expense cap.

### 4.02 Format

The applicant will be responsible for delivering all the work agreed to in the Proposal within the established budget. As used herein, "Proposal" means all the requested documents listed in Section 4.03, Submission Content, and any other information described in and submitted in response to this RFP.

- **Slide shows and PowerPoint Presentations will not be 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 essential information in reliance on website content. Video, audio or other similar multimedia materials will not be considered during evaluation of written proposals, although they may be accepted in Round 2 (oral presentations) of the procurement process.
- **The format must be U.S. standard 8 1/2 by 11 inches.** This is a U.S. buyer and therefore must be oriented to U.S. document sizes. Orientation should be primarily portraited, though landscape is welcome for data presentations as appropriate. No odd-sized pages allowed.
- **Page limit.** The complete proposal (all contents listed in Section 4.03) must not exceed sixty (60) pages. This applies to the narrative portion of the proposal and DOES NOT include budget plan worksheets, performance measure worksheets, schedule worksheets, Client References, Certificate of Vendor Compliance, Conflicts of Interest form, and W8/W9. Proposals that exceed 60 pages of narrative may be disqualified prior to evaluation.

### 4.03 Submission Content

All proposals shall include the following documents in the order listed to be considered for funding under this program. Proposals that fail to submit any one of these documents may be considered non-responsive. Description of proposal elements appear below in subsequent sections.

- No more than sixty (60) pages (submitted as one document):
  - Cover Page
  - Table of Contents
  - Cover Letter
  - Organizational Capacity
  - Professional Experience
  - Brand Management Plan – Leisure (narrative)
- Attachments
  - Budget Plan Worksheets
  - Performance Measure Worksheets
  - Schedule Worksheets
  - Client References



- Conflicts of Interest (downloadable form)
- Certificate of Vendor Compliance

#### 4.04 Cover Page

The cover page should include:

- RFP number and name: RFP 21-04 Hawai'i Tourism Inbound Destination Marketing Management Services in Europe.
- Applicant firm name and address.
- RFP contact information including name, title, email, phone. This would be the RFP contact person entered into eCivis.

#### 4.05 Table of Contents

Please present the materials in the order outlined in Section 4.03. Please include page numbers.

#### 4.06 Cover Letter

The cover letter is your opportunity to make a personal statement to the HTA and to the evaluation committee.

#### 4.07 Organizational Capacity

##### 1) ORGANIZATION.

##### a) Personnel Management

- i) Physical Office. At a minimum, the applicant should have or establish an office in the United Kingdom.
- ii) Organizational chart of proposed staffing, including position titles, names, lines of responsibility/supervision, and time allocation to HTA account.
- iii) Project Manager ("Key Point of Contact") to be assigned to the HTA account. As part of this contract, HTA will require a project manager (HTA's Key Point of Contact) that is 100% DEDICATED to the HTA account. The project manager shall not represent any destinations other than Hawai'i nor perform any administrative duties other than those related to the HTA account. List detailed qualifications including experience, time with the agency, resume/bio demonstrating qualifications related to this RFP, and qualifications as it relates to Hawai'i branding and culture.
- iv) Additional Staffing. The applicant shall identify other key members who will be assigned to the HTA account. List detailed qualifications for each position (including experience, time with the agency, resume/bio demonstrating qualifications related to this RFP and qualifications as it relates to Hawai'i branding and Hawaiian culture), proposed time allocation of staff and their planned geographic locations, and the other potential destinations/accounts the staff will be assigned to. Describe proposed full organization capacity appropriate for the initial operations, full performance, and surge capability.

Although a contractor, as a legal entity, may represent a competing market within the MMA, a contractor's project manager and staff shall be dedicated to providing services for Hawai'i and the HTA in the manner provided below:

<b>MMA</b>	<b>Project Manager ("Key HTA Point of Contact")</b>	<b>Staff</b>
Europe	Exclusive/100% Dedicated to Hawai'i /HTA Account	Non - Exclusive

**NOTE:**

The contractor for this MMA will be required to be fully staffed and operational in order to begin the transition activities in 2020 and the implementation of the destination marketing management services in the Calendar Year 2021. Any activity such as training and orientation that occurs prior to the execution of an agreement with the selected contractor shall be at the contractor's sole cost and expense.

Also, the contractor for this MMA is required to attend the 2020 Hawai'i Tourism Conference in Hawai'i in September. HTA will reimburse the airfare and accommodation costs for two people (Project Manager and one team member) to attend. Any additional members' travel costs are at contractor's own expense.

- v) Supervision and Training. The applicant shall describe its ability to supervise, train and provide administrative direction relative to the delivery of the proposed services.
- b) Major Subcontractors. The applicant shall provide a list of each intended major subcontractor expected to work on this project. Qualifying subcontracts are equivalent to 10% or more of the value of this contract or \$100,000.00, whichever is less.
  - i) Name, location, and contact information.
  - ii) The number of years this subcontractor has been used by your company.
  - iii) The goods or services that will be provided.
  - iv) Qualifications.
  - v) Competitive process that will be used to select the subcontractor, if applicable.
- 2) CAPACITY. Applicant's establishment, development, and accomplishments
  - a) Business entity.
    - i) Entity type. Years in business. Headquarter location and contact info.
    - ii) Branch offices and/or divisions. If an entity includes or previously included an office in Hawai'i, please provide details.
    - iii) Facilities, office space, and other physical assets available to the applicant to perform the work described in this RFP.
    - iv) Company history. Opportunity to provide more detailed experience and case studies as it relates to the scope of this RFP will come later in the "Experience" section of your proposal.
  - b) Accounting System. Describe how the applicant's accounting system will:
    - i) Accurately estimate and timely record actual expenditures for this contract;
    - ii) Accurately allocate and timely record all actual expenditures to the various budget categories defined in APPENDIX 3 Annual and Monthly Budget Plan Instructions and Worksheets;

- iii) Accurately estimate and timely record actual expenditures of change orders and modifications; and,
  - iv) Make certain only expenses that are allowable and allocable are charged against any reimbursable expense, change order, or modification of the contract issued under this RFP.
- c) Firewalls and other Protections
- i) Applicant shall describe processes and procedures to provide an information barrier, such as a “white room” or other form of firewall, within contractor's company or entity to prohibit the disclosure of competitively sensitive information acquired or provided through the performance of this contract on behalf of Hawai‘i and the HTA to any of the contractor’s clients or affiliates representing or associated with a competitor list agreed to by HTA.
  - ii) Applicant shall describe specific directives and procedures for its employees and other personnel assigned to the HTA to prevent the respective team, group or individuals from using HTA information for the advantage of a competitor, either by exchanging information in either formal or informal settings with employees assigned to competing markets, or by independent use of information by those who may have other assignments outside of HTA.
  - iii) Management and executive decisions must not disadvantage HTA against other clients. Hawai‘i’s best interests must be judged independent of other company interests or, if not, must be placed at the highest priority within the organization.

#### 4.08 Professional Experience

The applicant shall provide a complete description of its relevant experience in destination marketing described below:

- a) Describe the applicant’s experience and past performance history in destination marketing services:
  - i) Within this MMA
  - ii) Within the Hawai‘i tourism industry
  - iii) In general
- b) Creative Content: Provide at least three (3) examples of creative content prepared for clients by the Applicant. Examples must be reduced to 8 ½ x 11 form. The applicant may, in addition, reference web addresses; however, evaluators are not obligated to view websites.
- c) Case Studies: An applicant shall also provide no fewer than two (2) case studies representing the following areas:
  - i) Demonstrating your familiarity with both this MMA and with the Hawai‘i’s tourism industry.
  - ii) Demonstrating your familiarity with the Hawaiian Islands and Native Hawaiian culture and communities.
  - iii) Demonstrating experience in finding and using market research conducted within this MMA.
  - iv) Demonstrating experience in creating integrated target marketing projects deployed

within the MMA (include target market identification strategy, brand strategy, supporting online and offline activities, digital/social media strategy, trade collaboration, and travel industry marketing).

- d) Performance Measures: Describe a minimum of three (3) past work experiences that reflect the tracking of performance measures to targeted results, including the measurement methodology used.

#### 4.09 Brand Management Plan (BMP)

Applicant must present a comprehensive marketing plan, hereinafter referred to as a Brand Management Plan (BMP) for Calendar Year 2021. This plan will lay out all the strategies and activities that the contractor will accomplish during the contract period to drive brand awareness.

Brand Management Plan (BMP) – Leisure

The contractor will be responsible for formulating and executing a Leisure BMP. The Leisure BMP will describe what will be created and executed with anticipated deliverables aimed at fulfilling Key Performance Indicators. The Brand Management Plan should be clear and concise in communicating initiatives and sought outcomes supporting the KPIs that have been set. **See APPENDIX 1 for details on BMP-Leisure.**

HTA's key marketing objectives are as follows:

- a) Primary focus on leisure marketing in the United Kingdom with secondary focus in Germany.
- b) Drive destination brand awareness. Build the brand of the Hawaiian Islands as well as the
- c) specific islands of O'ahu, Maui, Hawai'i Island, Kaua'i, Lāna'i, and Moloka'i.
- d) Create campaigns that reinforce the unique attributes of each of the Hawaiian Islands.
- e) Take advantage of local market insights and intelligence on trends, distribution dynamics, consumer insights, and competitive analysis. Target both current and next generation of Hawai'i travelers.
- f) Drive high-value visitation; increase Per Person Per Day Spend and Visitor Expenditures for the Hawaiian Islands. Focus marketing on market segments that have higher trip expenditures.
- g) Collaborate with Hawai'i's visitor industry to optimize results and leverage resources.
- h) Maintain the cultural integrity of the Hawaiian language, customs and practices, music, dance, cultural and historic sites, and imagery in all marketing initiatives.
- i) Increase awareness, familiarization, and understanding of the diversity of Hawai'i's people, place, and culture to consumer and trade.
- j) Encourage high-value air service to Hawai'i.
- k) Stimulate high-value market share against competing destinations.
- l) Focus marketing and enhance tour product development to build a desire to visit during shoulder seasons.
- m) Maintain a balance between travel trade and consumer promotions, backed up by research regarding consumer destination travel shopping and buying trends.
- n) Ensure that initiatives are metrics driven.

#### 4.10 Client References

The applicant shall provide three (3) references and related contact information of customers who have used or are currently using applicant's services in the area of destination marketing. For each reference include the following information:

- a) Client's name, address, phone number, email, main contact;
- b) Types of services provided;
- c) Total contract price (or subcontracted portion); and,
- d) Geographic coverage of services provided.

#### 4.11 Conflicts of Interest Disclosure and Attestation

Applicant will be required to fill out and sign a Conflicts of Interest Disclosures and Attestations Form which is available for download on the eCivis RFP online portal. HTA policies require the analysis and mitigation of Organizational Conflicts of Interest (OCI). The individual contractor's reputation for integrity is a critical asset in performing government contract work. The Procurement Officer will use your answers to this questionnaire to identify and further evaluate the impacts of potential conflicts of interest and your proposed mitigation plans.

The form consists of two sections.

- 1) The first section asks yes/no questions designed to reveal any possible conflicts you may have. If you answer "yes" to any of these questions you will need to provide an attachment with additional information, including persons or entities involved, the nature of the activity, an estimate of the percentage of this contract that could be impacted by that activity, and any mitigation measures you have in place or plan to implement. Answering "yes" to any question will not automatically disqualify you. The explanations provided by you will allow HTA to evaluate the potential impacts of these conflicts and to analyze the respective mitigation plans. The Procurement Officer may consider applicant's candor, or lack thereof, in evaluating applicant's responsiveness and responsibility. Omission or misrepresentation may be grounds for disqualification.
- 2) The second section is a list of affirmative statements that an authorized signer must initial agreement to and acknowledgment of.

#### 4.12 Certificate of Vendor Compliance (CVC) Required

The applicant must provide, as part of the application process, evidence that the applicant currently possesses, or has filed for, a Hawai'i State Certificate of Vendor Compliance (CVC). See Section 3 of this RFP for details.

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## **SECTION 5 – SCORING, EVALUATION CRITERIA AND CONTRACT AWARD**

### **5.01 Threshold Considerations**

In addition to meeting the requirements of the RFP, the proposal must pass a threshold judgment of whether it fills the needs of the service being solicited. If the proposal is evaluated to be unfit it may be put aside as nonresponsive. This judgment may be made by HTA prior to scoring, or it may be made during the scoring process by the evaluators themselves.

### **5.02 Evaluation Committee**

Proposals will be evaluated by a Committee whose members include HTA representatives and may 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.

### **5.03 Procurement Officer**

The HTA's primary point-of-contact is the Procurement Officer identified in Section 2 of this RFP. The Procurement Officer serves as the arbitrator and referee for this RFP. The Procurement Officer does not serve as a voting member of the evaluation committee.

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

### **5.04 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 may 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 2 of this RFP. HTA is not responsible for misinformation provided by anyone other than the Procurement Officer.

### **5.05 Proposal Evaluation Criteria and Scoring Guidelines**

Written proposals will be reviewed, evaluated and scored by an evaluation committee based on five scoring criteria, each criterion is designated a scoring range. The evaluators are free to score anywhere within the scoring range. There is no separate weighting.

The evaluation committee has the option of selecting finalists to give oral presentations. In the event of an oral presentation round, the evaluators will fill out fresh scoresheets for the finalists. This will be the same scoresheet as in the first round.

The evaluation criteria and scoring guidelines are as follows:

<b>EVALUATION OF PROPOSAL</b>	Scoring Range Maximum
<b>OVERALL CAPABILITIES OF FIRM</b> The evaluation will include an assessment of the history of your company, your experience as it relates to the requirements of this RFP, evidence of past performance and related items	20
<b>BRAND MANAGEMENT PLAN (BMP)</b> The evaluation will include an assessment of the quality of proposed strategies, creativity, vision and marketing knowledge as demonstrated through the content of the BMP, in addition to ROI measurement systems, and related items	30
<b>FAMILIARITY WITH HAWAI'I BRAND &amp; PRODUCT</b> The evaluation will include an assessment of your understanding of the Hawaiian Islands, the native Hawaiian culture, Hawai'i's multi-culture, and the HTA organization; how you integrate this knowledge into your proposal, cultural fit and related items. Note: this is not a separate section of the proposal, but is an analysis of your whole presentation.	20
<b>QUALIFICATIONS OF PERSONNEL</b> The evaluation will include an assessment of the qualifications, experience, and specific knowledge of your managerial team, staff and subcontractors as it relates to the requirements of this RFP and related items, and the overall percentage of staff time dedicated to Hawai'i.	20
<b>COST-EFFECTIVENESS</b> The evaluation will include an assessment of the maximum services provided in relation to the fees charged and the budget ratio of programs to administrative fee (staffing, office, profit/retainer) to ensure that it is reasonable and appropriate.	10
<b>TOTAL SCORE</b>	<b>100</b>

## 5.06 Evaluation and Award Process

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

Round 1: Proposals will first be evaluated by the Procurement Officer to have met the threshold considerations outlined in Section 5. Members of the Evaluation Committee will then score the proposals using the scoring criteria described in this Section 5 of the RFP. Applicants will be ranked based on scores.

Round 2: 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 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. Tentative dates for oral presentations/interviews are listed in the timeline found in Section 2. 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 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.

### 5.07 Award Letter and Post Selection

The 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 (e.g. Updated or Revised Work Plan, Certificate of Vendor Compliance).

### 5.08 Debriefing

Non-awardees will receive a debriefing letter that documents the selection process that took place for this RFP, and that provides protest policies and procedures.

### 5.09 Protest

- 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. There are two types of protest:
  1. Protest of the contents of the RFP. Protest of the RFP content must be submitted within five business days of the issuance of the addendum answering applicant questions, if there is one. Please see procurement timeline for details.
  2. Protest of non-award. Any protest of non-award must document evidence of procurement impropriety by HTA to be considered.
- 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 listed in the procurement timeline or as otherwise amended by HTA.
- d) A protest may be delivered via email or via a reliable delivery service, but the protest must actually be received by HTA by the deadline:

Chief Administrative Officer: Keith Regan

Procurement Officer: Ronald D. Rodriguez



Mailing Address:

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

Email Addresses:

HTA Contracts Office – [contracting@gohta.net](mailto:contracting@gohta.net)

Keith Regan – [keith@gohta.net](mailto:keith@gohta.net)

Ronald D. Rodriguez – [ronald@gohta.net](mailto:ronald@gohta.net)

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## SECTION 6 – CONTRACTING PROCESS AND PERFORMANCE

### 6.01 Contract Execution Process

The contract execution process consists of the following steps:

- 1) HTA received the contractor’s current Certificate of Vendor Compliance, as well as any other documents or information that may be required by HTA and as may have been outlined in the Award Letter.
- 2) A PDF of the contract is emailed to the Contractor along with instructions. If the contractor agrees with the terms, the 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. The contract is sent to the Hawai’i attorney general’s office for approval.
- 4) Deputy attorney general approves the contract for form and signs. The contract is returned to HTA.
- 5) HTA makes copies of the contract and distributes as follows: HTA program manager, Contractor, Hawaii Department of Accounting and General Services (DAGS).
- 6) DAGS approves the contract. Once it is approved by DAGS, the contractor can start
- 7) submitting invoices and deliverables as outlined in the contract’s Payment Schedule.

### 6.02 Contractor Name

The contract will be between the State and the Contractor. The STATE requires exact concurrence in all official documentation regarding the identity of the contractor. This means that the name on the W9 or W8 (as applicable), 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, or tax ID numbers. (See Section 3 for information on the certificate of vendor compliance.)

### 6.03 Fixed Price

This contract is a fixed price contract. The contractor will be responsible for completing all the work agreed to in the Proposal and Contract within the budget agreed to in the Proposal and the contract unless otherwise agreed to by the HTA. See Section 4 for information on the fixed price.

### 6.04 General Conditions

The Hawai’i State General Conditions, as amended for this contract by the HTA, will be incorporated into the contract. The HTA reserves the right to reject, without further notice, submittals that do not include an agreement to accept these amended conditions in their entirety. The General Conditions are available for download from the eCivis portal. The amendments to the General Conditions are identified in the Exhibit to this RFP entitled “HTA Amendments to the General Conditions”

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.

## 6.05 Unauthorized Work

Unless otherwise agreed, a contractor may not perform any work prior to the execution of a written contract by the HTA and a contractor. Contractor may engage in preparation and planning, but all unauthorized work performed by the contractor prior to the execution of a written contract shall be at the contractor's sole cost and expense.

## 6.06 Payment

The contract will have a "not to exceed" amount. The STATE has allocated a maximum amount of funds for this contract. It is expected that the contractor will be able to achieve all the goals set out in the Proposal without the need for any additional monies and will be responsible for delivering and completing all work agreed to within the proposed budget.

The contractor will be put on a payment schedule and each payment will have associated deliverables tied to it. The contractor will be required to submit an invoice along with any related deliverables in order to receive payment. There is often a delay between services and payment, so the contractor agrees to utilize its own financial resources to fund at least two months of the services described in its Brand Management Plan and Budget. Form A "Conflicts of Interest Disclosures and Attestations" includes a statement that applicant will need to sign confirming the availability, and agreeing to use, of these financial resources.

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. Invoice must also include the HTA contract number as well as a contractor-generated invoice number. 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 market manager for details.

## 6.07 Contract End Date and Time of Performance

Reports are based on calendar year figures with the final calendar year being 2023. Contract performance should end December 31, 2023, but the contract end date will be extended to March 31, 2024, to allow time to create and compile required reports and other deliverables.

## 6.08 Multi-year Contract

Sufficient funds to pay for the initial contract year are available. The contractor acknowledges and agrees that, for subsequent years, the availability of funds from the Tourism Special Fund established under the laws of the State of Hawai'i for any fiscal year (July 1 to June 30), shall initially be subject to the passage of a budget appropriation of public funds by the Legislature, and subsequently to the approval of an allotment of the budgeted funds by the Governor, through the Director of Finance, State of Hawai'i.

Each calendar year of the contract is funded by a separate and respective fiscal year in the manner described above. It is understood that the head of purchasing must notify contractor on a timely basis if funds are not available for continuation of the contract for each succeeding fiscal period and that, in the event of a cancellation, contractor will be reimbursed the unamortized, reasonably incurred, nonrecurring costs.

Absent any substantial changes to scope, the price for subsequent years should correspond to the

contracted amount in the initial contract year.

## 6.09 Evaluation of Contract Performance

Success of the Hawai'i Tourism Authority and its contractor marketing efforts will be measured by the following Key Performance Indicators (KPIs):

- Growth in PPPD spending
- Growth in total expenditures
- Improvement of local residents' sentiment as measured by an improved response to the question "tourism brings more benefits than problems". (see EXHIBIT A: HTA Website References – HTA Resident Sentiment Survey)
- Results of a Visitor Satisfaction survey question asking if visitors recall hearing or seeing information about safe and responsible travel

The HTA will review the monthly, mid-year, and year-end performance reports provided by the contractor for the MMA.

Each Performance Review will cover the following topics:

- Review of decreases and increases in KPIs and performance measure results against targets.
- Campaigns, Programs and Activities - the actual campaigns and programs conducted, and activities performed versus the HTA-approved Brand Management Plan.
- Brand Integrity - Evaluation of contractor's ability to maintain the brand integrity and cultural integrity of the Native Hawaiian culture and Hawai'i's multi-ethnic culture through its activities in promoting the Hawaiian Islands.
- End of Month Accountability Report and Budget Variances - Evaluation of significant changes of each main budget category (e.g. Advertising, Public Relations & Promotions, Trade Marketing, Research, Hawaiian Culture Integration, Staffing & Office, Contractor Profit/Retainer) and any major shifts between subcategories under each main budget category (e.g. Media Costs, Production Costs under Advertising).

The contractor will be evaluated on the quality of proposed annual Brand Management Plans (BMP), the effectiveness of approved BMP execution, timeliness of deliveries, accuracy of forms and expenditure reports, responsiveness to HTA requests and good communication in general.

Meetings either in person or via teleconference will be required as deemed necessary by HTA.

## EXHIBITS

### EXHIBIT A: HTA Website References

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

<b>Item</b>	<b>Website</b>
HTA RFP Website	<a href="http://www.hawaii tourism authority.org/RFPs">http://www.hawaii tourism authority.org/RFPs</a>
RFP Registration, Application, Forms, Submission	<a href="https://bit.ly/31c2oZh">https://bit.ly/31c2oZh</a>
Hawai'i Tourism Authority Website	<a href="http://www.hawaii tourism authority.org">www.hawaii tourism authority.org</a>
HTA Economic Impact Fact Sheet	<a href="https://hawaii tourism authority.org/media/4242/hta-tourism-econ-impact-fact-sheet-january-2020.pdf">https://hawaii tourism authority.org/media/4242/hta-tourism-econ-impact-fact-sheet-january-2020.pdf</a>
HTA Programs	<a href="https://www.hawaii tourism authority.org/what-we-do/">https://www.hawaii tourism authority.org/what-we-do/</a>
HTA Resource & Style Guide	<a href="https://bit.ly/2QQLCKI">https://bit.ly/2QQLCKI</a>
Ma'ema'e Toolkit	<a href="https://bit.ly/2MrqonN">https://bit.ly/2MrqonN</a>
Business Planning Resources	<a href="https://www.hawaii tourism authority.org/what-we-do/tools-resources/business-planning-resources/">https://www.hawaii tourism authority.org/what-we-do/tools-resources/business-planning-resources/</a>
HTA Research	<a href="https://www.hawaii tourism authority.org/research/">https://www.hawaii tourism authority.org/research/</a>
Hawai'i Compliance Express (Certificate of Vendor Compliance)	<a href="https://vendors.ehawaii.gov">https://vendors.ehawaii.gov</a>
eHawaii.gov YouTube Channel	<a href="https://www.youtube.com/user/eHawaii gov 1/videos">https://www.youtube.com/user/eHawaii gov 1/videos</a>
Hawai'i State General Conditions	<a href="https://bit.ly/2WLAAMA">https://bit.ly/2WLAAMA</a>
Chapter 201B HRS. HTA's inception statute.	<a href="https://bit.ly/2Wozk28">https://bit.ly/2Wozk28</a>
HTA Five-Year Strategic Plan	<a href="https://hawaii tourism authority.org/who-we-are/our-strategic-plan/">https://hawaii tourism authority.org/who-we-are/our-strategic-plan/</a>
HTA Brand Assets (photos, videos, b-rolls)	<a href="http://www.barberstock.com/hawaii">www.barberstock.com/hawaii</a>
Consumer Website	<a href="http://www.gohawaii.com">www.gohawaii.com</a>
Travel Trade Website	<a href="https://agents.gohawaii.com/">https://agents.gohawaii.com/</a>
Media Website	<a href="http://media.gohawaii.com/statewide/">http://media.gohawaii.com/statewide/</a>
MCI Website	<a href="https://www.meethawaii.com/">https://www.meethawaii.com/</a>
HTA Resident Sentiment Reports	<a href="https://hawaii tourism authority.org/research/evaluation-performance-measures/">https://hawaii tourism authority.org/research/evaluation-performance-measures/</a>

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## EXHIBIT B: HTA Amendments to the State's General Conditions

As part of the proposal, applicants are required to accept the State's General Conditions as amended in the RFP by the HTA. (See Form A, Conflicts of Interest Disclosure and Attestations.)

**The State's General Conditions are available for download on the eCivis RFP portal at <https://bit.ly/2WLAAMa>.** The HTA amendments to the General Conditions, for this contract, are as follows:

1. Coordination of Services by the State. Paragraph No. 1 of the attached General Conditions is amended to read as follows:

- a. The President and Chief Executive Officer of the Hawai'i Tourism Authority is the head of the purchasing agency ("HOPA"). A designee assigned by the HOPA will coordinate the services to be provided by the CONTRACTOR in order to complete the performance required in the Contract.
- b. The CONTRACTOR will maintain communications with the assigned designee at all stages of the CONTRACTOR'S work, and submit to HOPA for resolution any questions which may arise as to the performance of this Contract.

2. Hawai'i Compliance Express. Paragraph No. 2i of the attached General Conditions is further clarified as follows: The current "designated certification process" is Hawai'i Compliance Express. In lieu of presenting the separate certificates from the Department of Taxation, Labor and Industrial Relations, and Commerce and Consumer Affairs, as outlined in Paragraphs 2e, 2g, and 2h, the CONTRACTOR shall obtain and provide the HTA with a current Certificate of Vendor Compliance from the Hawai'i Compliance Express that is current within six months of the start of the contract prior to commencing any performance under this Contract. The CONTRACTOR shall also be solely responsible for meeting all requirements necessary to obtain the Certificate of Vendor Compliance as required for final payment under section 103-53, Hawai'i Revised Statutes (HRS), as amended, and Paragraph 17 of these General Conditions.

3. Conflicts of Interest. Paragraph No. 5 of the attached General Conditions is further clarified as follows: CONTRACTOR acknowledges and agrees that it has represented to HTA, and HTA has justifiably relied upon such representation, that CONTRACTOR is duly authorized, by law and in equity, to conduct the PROJECT described in the PROPOSAL under the trade name or other name commonly understood for the PROJECT. CONTRACTOR 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 this Contract and withhold any payment to CONTRACTOR.

4. Limited License to Use Intellectual Property. The STATE hereby grants to the CONTRACTOR, a non-exclusive limited license during the time of performance for this Contract only, to use any designated intellectual property, including any domain name, trade name, service mark, tag line, or logo (hereinafter referred to cumulatively as "Licensed Property"), which is owned, copyrighted, registered, patented, or reserved by the HTA, for the purpose of promoting and marketing Hawai'i as a visitor destination and in a manner consistent with the "Hawai'i Tourism Authority Five-Year Strategic Plan 2016," incorporated herein by reference, and with any other brand management plans. The CONTRACTOR covenants and agrees that its use of the Licensed Property shall be of high standards and of high quality, style, and appearance and that

CONTRACTOR shall, at all times, maintain, increase, or enhance the goodwill associated with the Licensed Property. The CONTRACTOR shall not authorize, assign or grant any interest in the Licensed Property without the STATE's prior written consent.

5. Conflict Resolution. Notwithstanding any provisions or representations to the contrary, any conflict among the various provisions of this Contract shall be resolved by allowing the various provisions in the following documents, in order of priority, to control:

- (1) Hawai'i State law; then
- (2) HTA regulations, policies or procedures; then
- (3) The Executed Agreement, including the contractor's final proposal, with any modifications, amendments or other properly documented changes; then
- (4) The RFP as amended; then
- (5) The course of conduct, then
- (6) The course of dealing, then
- (7) General principles of government contracting; then
- (8) Tourism industry practices.

6. Execution in Counterparts. This Contract may be executed in one (1) or more counterparts, each of which shall be deemed an original, but all of which shall constitute the same instrument.

7. Travel Protocol. As a State agency, HTA is required to follow an ethics code that informs our travel policy. See HTA's travel policy, attached as the Exhibit entitled "HTA Travel Protocol." HTA reserves the right to review contractor's travel policy and if elements fall outside of the attached policy, contractor must work with HTA to ensure that all travel related to HTA work does not violate State ethics laws.

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## EXHIBIT C: HTA Travel Protocol

As a State agency, HTA is required to follow an ethics code that informs our travel policy. HTA reserves the right to review contractor's travel policy. If elements of the contractor's policy fall outside of the following protocol, HTA will require contractor to take measures to ensure that all travel related to HTA work does not violate State ethics laws.

### Business Travel

- HTA and Contractor Staff Travel
  - HTA meetings – Contractors make own arrangements with O'ahu hotels at prevailing "industry rate". In conjunction with pre/post FAMs, HTA staff works with Island Chapters to negotiate group rates with hotels. Never ask for upgrades. Use lowest public rates for air to get to Hawai'i. Never ask for or accept air upgrades.
  - Contractor Educational FAM – HTA staff works with Island Chapters to negotiate group rates with Neighbor Island Hotels. Never ask for upgrades.
  - Escorting FAM – Use negotiated FAM rate for both hotel and air. If air or hotel is complimentary for customers, ask for industry rate for yourself. Never ask for upgrades. Never accept air upgrades.
  - Industry meetings – Make own arrangements. Ask for prevailing "industry rate". Use lowest public rates for air. Never ask for or accept air upgrades.
  
- Leisure Customer Travel
  - HTA meetings – Ask customers to work directly with airlines and hotels if they are coming to Hawai'i for an HTA meeting. Can make introductions if appropriate.
  - Solo FAM – Ask customer to work directly with airlines and hotels. Can make introductions if appropriate.
  - Organized FAM – OK to negotiate air and hotel group rates with hotels and airlines for customers based upon business potential.
  
- MCI Customer Travel
  - Solo Travel/Site – OK to negotiate air and hotel industry rate for customer based upon potential group business. Engage Island Chapters and/or HCC where appropriate.
  - Organized FAM – OK to negotiate air and hotel group rates for customers based upon potential group business. Engage Island Chapters and/or HCC where appropriate.
  - Team Business Travel/Site – OK to negotiate air and hotel group rates for customers based upon potential group business. Engage Island Chapters and/or HCC where appropriate.
  
- Media Travel
  - Solo Travel to cover a story – OK to introduce to Island Chapters for vetting and introduction to hotels and/or airlines for industry rate based upon media potential.
  - Organized FAM – OK to negotiate air and hotel group rates based upon media potential.
  - Engage Island Chapters and HTA PR agency where appropriate.



## **Personal Travel**

Do not get involved with anyone, even customers, asking for favors. OK to make appropriate introductions for key customers. Do not ask for or accept personal favors of any kind for your own travel.

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## APPENDICES

### APPENDIX 1: Brand Management Plan (BMP) Outline - Leisure

The Brand Management Plan (BMP) – Leisure shall describe marketing strategies and implementation plan aimed at fulfilling HTA Marketing Objectives (See Section 4 of the RFP) and Key Performance Indicators (KPIs) and BMP performance measures. The BMP should be clear and concise in communicating strategies, actions and projected outcomes.

The BMP shall include the following components:

#### NARRATIVE

- A. Overview/Market Analysis. A clear and concise overview of the current market conditions, competition, economic indicators, consumer as well as travel industry trends that are occurring in your market. As a result of all these variables, a summation of how you view the market potential specific to Hawai'i. Include research-driven insight into consumer destination travel shopping and buying behaviors that informs your plans.
- B. Assumptions. Describe any market conditions that would affect visitation to Hawai'i and your ability to implement the plan for your market. Identify market specific distribution channel assumptions based upon known consumer practices.
- C. Target Audience. Identify specific geographic region and target lifestyle segments applicable to your market that will have the greatest return on marketing investments and why.
- D. Strategies. Identify and describe your marketing strategies (not tactics) in the following categories:
  1. Consumer strategy(s). Align with the target audience through promotions, public relations, and advertising (if applicable) to build brand awareness for the destination.
    - a. Island distribution strategy(s). Drive multi-island visitation with added focus on Hawai'i Island by developing initiatives and activities that are unique to each island and reinforce each island's brand position (APPENDIX 1, Attachment 1)
  2. Trade Marketing strategy(s).
    - a. Identify key travel trade targets and advertising strategies and rationale.
    - b. Educational strategy(s) to educate and train the trade (tour operators and retail agents, etc.) about Hawai'i, each individual island's unique brand and the Hawaiian culture.
    - c. Airline strategy(s) to encourage high-value airlift from the MMA. Include actions that will orchestrate the development and/or maintenance of airline relationships with the goal of monitoring load factors, and the development of activities to support high-value routes.
    - d. Cooperative Program strategy(s) to include advertising and promotional programs with key industry organizations and distribution partners as market specific channel distribution warrants.
  3. Public Relations & Promotions strategy(s). This strategy shall include but is not limited to the identification of potential story angles against market niches; support needed to

- achieve stories; identification of unconventional means to gain exposure; target publications that align with the targeted lifestyle segments for the MMA; and, identification of media vehicles from traditional print to social media.
4. Industry collaboration strategy(s). Explain plan to establish and maintain monthly face-to-face or web-based meetings with Hawai'i based industry partners to build strong working relationships. Define an ongoing strategy to connect with both Hawai'i and in-market industry partners to ensure the development of a collaborative marketing plan. The plan should include ongoing input strategies that serve to consistently align with stakeholder marketing efforts.
  5. Research strategy(s). The HTA or its research contractors will perform primary and overall strategic research activities. The contractor will be able to draw on existing research (See Exhibit A: HTA Website References – HTA Research) and participate in planning for future research projects. The contractor may only be compensated for contractor-initiated research if it is not redundant of existing research and after prior approval of HTA. Identify all forms of research used and future needs to inform the development of initiatives as well as to measure BMP strategies.
  6. Gohawaii.com Strategy(s). Gohawaii.com serves as the central website for Hawai'i travel inspiration and information for the consumer audience. The Hawai'i Visitors and Convention Bureau (HVCB), contracted by the HTA, manages Gohawaii.com which is made up of a main English language site and additional sites in German, Spanish, French, Japanese, Korean and Simplified Chinese. HVCB is responsible for the development, creation, analysis, maintenance and optimization of the website(s), including text, video, music, audio, images, and other digital content, that is hosted on a web server and accessible via the Internet. The HTA has sole ownership of the database of consumer or customer information acquired through the website, maintained by HVCB. Describe steps you will take and resources you will engage to provide the HTA and HVCB with guidance and insight for your market specific site. Please describe strategies for using this medium to influence travel decisions specific to your market's user habits and culture. (Note: Contractor shall not develop a duplicative website and will work with HVCB in directing and updating content on the existing website.)
  7. Digital Marketing Strategy(s). Currently, HVCB supports channels on Facebook, Instagram, WeChat, Weibo and more. HTA and its contractors use Khoros as its central content management system for social (scheduling, publishing, social interaction management, usage-rights management, etc.) and all marketing contractors are required to utilize this system, managed by HVCB. Hawai'i content such as photography, videos, stories, etc. are made available for all markets and usage of these assets in development of their social media content is left up to the discretion of the individual market. In addition to the core Hawai'i content that HTA provides, please describe ideas specific to your market to include (but not limited to) social media content strategy, paid media strategy, and influencer marketing strategy. (Note: Contractor shall not develop a duplicative social media profile and will work with HVCB in maintaining branded communications through social media channels.)
  8. Responsible Tourism. Responsible Tourism is "an active awareness about the effects travel can have on places, both positive and negative." HTA seeks to develop responsible travelers – considering who and how they interact with the residents, the impact their

movement throughout the destination has on the environment, and selecting accommodations, transportation, and activities in a manner that helps preserve the destination and benefits the people who live there. Describe your strategy to educate visitors about how to travel throughout the Hawaiian Islands in a sensitive manner. Note: HVCB has created and continues to develop pre-arrival (Hawai'i Rooted campaign) and post-arrival assets (Kuleana campaign) that can be used by all contractors in this effort. (EXHIBIT A: HTA Website References – HTA Brand Assets)

- E. Action Plan Integration. Briefly describe overall action plan, key campaigns and programs, and how the various elements are integrated with HTA's 4 pillars including Hawaiian Culture, Natural Resources, Community and Brand Marketing.
- F. Performance Measures. Describe the measurement methodology used to track each of the performance measures.

## **CREATIVE CONTENT**

The HTA seeks to globally align the Hawai'i brand positioning by centralizing its creative assets. Currently, the HTA works with HVCB as the creative content contractor for the purpose of intellectual property data bank management meaning and including the creation (coordinated with each MMA), purchase, cataloging, tracking, licensure, protection, and management of intellectual property owned by the State or HTA and used to market Hawai'i as a visitor destination. This management includes, without limitation, trademarks, service marks, logos, slogans, trade names, websites and domain names, images, artwork, film, digital footage, customer database, and other intellectual property.

The HTA and HVCB manage the data bank a.k.a. the "Knowledge Bank". All MMAs will utilize the Knowledge Bank in performance of destination marketing activities and work in coordination with the creative content contractor in development of all assets. For the purposes of this RFP and utilizing the Knowledge Bank plus other available assets, please develop and provide samples (up to 4) of the creative assets that best convey the concepts of your strategy. Demonstrate the ability to maintain the cultural integrity of Hawaiian language, customs, and imagery and increase awareness, familiarization, and understanding of Hawai'i's people, place and culture. Creative content shall reinforce the Hawaiian Islands and each island's brand position (APPENDIX 1, Attachment 1) and utilize the HTA Resource and Style Guide (EXHIBIT A).

## **LEISURE SCHEDULES**

Schedule Worksheets include the following:

- 1) Industry Educational Training including workshop presentations, seminars, webinars.
- 2) FAM trips for travel agent, wholesaler, media which details the dates and islands visiting.
- 3) Media schedule (advertising) for print, broadcast, co-op, social media, and e-marketing.
- 4) Trade Show participation in trade and consumer shows and events.
- 5) Editorial calendar showing how stories will be timed in the market.

The electronic copy of the Leisure Schedule Worksheets in Excel is available for download on the eCivis portal.

## **LEISURE PERFORMANCE MEASURES**

Applicants will be responsible for developing semi-annual and annual Leisure performance

measures using a tracking worksheet.

The electronic copy of the Leisure Performance Measure Worksheet in Excel is available for download on the eCivis portal.

**BUDGET PLAN** (see APPENDIX 2: Annual and Monthly Budget Plan Instructions and Worksheets)

As part of the BMP, applicants will be responsible for creating Leisure budget using the Annual and Monthly Budget Plan Worksheets. Each proposed budget will be rolled up into one total budget amount not to exceed the dollar amount allocated for the market.

An Applicant shall submit a Fixed Price Proposal. This is a firm fixed price contract for no greater than four hundred thousand dollars (USD \$400,000.00), tax inclusive, for Calendar Year 2021. The total amount is subject to change. The fixed price is inclusive of all aspects of the contract. Staffing and office expenses must be included in the fixed amount and may not exceed twenty-six percent (26%) of the total fixed price. Contractor profit/retainer must be included in the fixed amount but should not be accounted for within the staffing and office expense cap.

Contractor will be responsible for staying within the budget presented in the proposal and outlined in the contract. It is expected that the contractor will be able to achieve all the goals set out in the proposal without the need for any additional monies and will be responsible for delivering and completing all work agreed to within the proposed budget.

**MULTI-YEAR BUDGET**

Sufficient funds to pay for the initial contract year are available. Each calendar year of the contract is funded by a separate and respective fiscal year and is subject to the availability of funds as appropriated by the State legislature and approved by the HTA Board of Directors. See Section 6 of the RFP for details.

Absent any substantial changes to scope, the price for subsequent years should correspond to the contracted amount in the initial contract year.

## Attachment 1: The Hawaiian Islands and Island Brand Identities

### What Do We Promise to our Visitors?

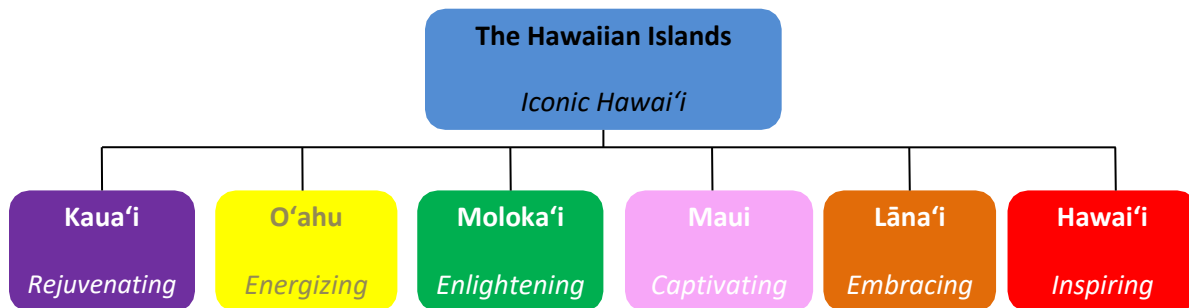
*The Hawaiian Islands have played the role of the idyllic Pacific Islands in the hearts, minds, and dreams of travelers for centuries. We are a unique collection of Islands, each offering a unique experience. We are the most exotic destination in the United States and a unique cultural and geographic environment that exists nowhere else on earth. We provide a safe and diverse environment for travelers to create their own adventures. We are viewed as lush, luxurious and welcoming – a “dream vacation” for many people.*

We discovered that when a traveler learns that Hawai‘i offers unique experiences on each island, it made them even more interested in visiting. The brand messages for each island are identified in the following pages.

### Statewide Brand Explained

The **Hawaiian Islands brand structure** focuses on the **unique FEEL** of each Island experience, allowing us to promote a wide range of products on each Island and appeal to both the rational and emotional needs of our target consumers.

### Diagram 1: Hawaiian Island Brand Structure



### Island-level

Communications will focus on presenting distinctive experiences within the overall emotional context of the Island. These words in the chart provide a central focus for each brand but will not be used as taglines or explicit messages in marketing communications.

### Visitor Profile:

The Hawaiian Islands visitor seeks experiences that are “foreign yet familiar” – a safe adventure in an exotic locale that is different enough to be interesting, familiar enough to be easy to navigate. We enjoy strong repeat visitation, but some of those who have visited only once feel a sense of “been there, done that,” and need to discover the variety of experiences that The Hawaiian Islands have to offer. The ideal visitor to The Hawaiian Islands embraces the spirit of Aloha and enjoys independent travel. The Hawaiian Islands have long been a “dream” destination for them – and if they knew The Hawaiian Islands offered a range of unique Island experiences, they’d be more likely to visit!

## **Kaua'i's Brand Explained**

*Deep within every human being, buried all too often beneath layers of modern life, is a primal connection with nature. It is on Kaua'i that this connection reawakens. Take a step in any direction and plunge into a world of infinite greens and blues, a world that restores your inner equilibrium and reassures you that the Pacific island of your dreams does indeed exist. Peaceful, lush and naturally spectacular, this is Kaua'i.*

### **Visitor Profile:**

The Kaua'i visitor is attracted to nature and the peaceful, immersive environment it offers. They travel to escape the busyness of their life at home and have little interest in urban experiences or crowds. They tend to be less active, preferring to spend prolonged periods immersing themselves in a single experience rather than sampling a lot of variety. Relaxing on vacation is their number one priority and they don't want to feel pressured to "see all the sights."

## **O'ahu's Brand Explained**

*From its famous surf culture to the vibrant nightlife of Waikiki, The Island of O'ahu pulses with the beat of contemporary Hawaiian culture. We are an Island playground for active travelers. We are a unique fusion of city and country, American and Polynesian, modern and historic. Travelers leave our Island more energized than when they arrived. We are for people who want to be active on vacation, sample many things, and enjoy an urban environment and unique culture.*

### **Visitor Profile:**

The active and social O'ahu visitor is attracted to urban experiences full of energy and variety. They don't come on vacation to escape – they travel to engage and relax by being active. They make a list of all the iconic attractions and activities they want to experience and will be disappointed if they aren't able to complete their wish-list. They appreciate nature's beauty but aren't avid outdoor enthusiasts. They experience nature as a backdrop to their adventures and would rather enjoy a beautiful view than actually trek into the forest. Shopping and nightlife are an important part of their vacation and they enjoy festivals and events.

## **Moloka'i's Brand Pillars**

*Quiet open roads; still practice Hawaiian living; "talk story" with locals; no traffic, congestion or pollution; stay open to the unexpected; rich in Hawaiian culture and history.*

## **Maui's Brand Explained**

*With its close proximity and leisurely pace, you never have to travel too far or plan in advance to discover pleasant surprises in Maui. We are an Island of spontaneous moments. We're big enough to provide lots of options, small enough to take the work out of choosing. We offer endless opportunities for spur of the moment fun. You can be as relaxed or as active as you choose on Maui. We are for people who want to have fun but don't want to be on a schedule.*

### **Visitor Profile:**

The Maui visitor seeks variety, choice, and spontaneous adventures. They want to know lots of options are available but want to have the freedom to be as active or relaxed as they choose, all on the spur of the moment. They want to sample different experiences without diving too deeply into or committing too much time to anyone. They enjoy nature but want to experience it in a passive,

civilized way rather than wandering too far off the beaten path. Soft adventure is what interests them, from lying on the beach to wandering through shops and discovering local artisans. Most of all, they believe enjoying a vacation shouldn't feel like work – too much planning turns them off.

### **Lāna'i Brand Pillars**

*Solitude; serenity; pampered; peaceful and quiet; relaxed, but not bored; active, but not overdone.*

### **Hawai'i Island's Brand Explained**

*From deep beneath the earth's crust to high in the heavens above, Hawai'i, the Big Island, has inspired awe in everyone from ancient civilizations to curious schoolchildren. We are active volcanoes, star-filled nights, diverse climates and ancient civilization. We offer unique access to nature at its most powerful and raw. We are for people who want to explore and experience wonder. We inspire awe in travelers and give them bragging rights to last a lifetime.*

### **Visitor Profile:**

The Hawai'i Island visitor is active and adventurous with an insatiable curiosity. They seek unique and unusual adventures that they can't get anywhere else and like the idea of having "trips" within their vacation. They have an interest in history and culture and are attracted to natural wonders. They enjoy road trips and don't mind committing a significant amount of time to tour – after all, "getting there" is half the fun. You can find them lounging on the beach, but it's just a rest stop on their way to the next great adventure.



## APPENDIX 2: Annual and Monthly Budget Plan Instructions and Worksheets

(The electronic copy of Budget Plan Worksheets in Excel is available for download on the eCivis portal)

- 1) **The contractor will be responsible for a Leisure budget.** The Budget Plan gives the HTA staff and the Evaluation Committee insight on how you intend to organize and manage the work under this contract and form part of the baseline for evaluation of the selected applicant during contract performance.
- 2) **Budget Organization.** The applicant's entire scope of work under this RFP shall be known as the "project." The applicant shall breakdown the project into "programs". The number and content of the major programs are at the applicant's discretion. Programs should be organized in the manner the applicant determines is most appropriate to organize the work under the project. For example, programs could be based on geography, market segments [Leisure, MCI, etc.], workflow, target audiences, or other groupings that the applicant chooses. PLEASE LABEL PROGRAM TABS. (i.e. Program A: "Leisure - Australia", Program B: "Leisure -New Zealand", Program C: "MCI- Australia", Program D: "MCI-New Zealand", or Program A: "Honeymoon", Program B: "Adventure Traveler", etc.)
- 3) **Budget Categories.** The HTA has established the following seven (7) main budget categories upon which an applicant will be evaluated and will be required to report as a contractor:
  - a) Advertising;
  - b) Public Relations and Promotions;
  - c) Trade Marketing;
  - d) Research;
  - e) Hawaiian Culture Integration
  - f) Staffing & Office; and,
  - g) Contractor Profit/Retainer.
- 4) **Annual and Monthly Budget.**
  - a) The applicant shall submit monthly End-of-Month (EOM) Accountability Reports that include the Annual Budget versus the year-to-date (YTD) Actual with YTD Remaining and Monthly Actual, as well as an overview of current and upcoming key initiatives.
  - b) The applicant shall submit annual and monthly budget plans. Program level worksheets will include only Advertising, Public Relations, Travel Trade, Research, and Hawaiian Culture Integration. Staffing & Office and Contractor Profit shall be separated from program budgets and reported on a single tab marked "Administrative".
  - c) The HTA Budget Worksheets have been pre-formatted in Excel to provide a **Budget Plan Summary** tab, **Summary of Programs** tab, **Summary of Budget Categories** tab, several **Program** tabs, and **Administrative** tab that applicants must use in presenting their budget breakdown. The individual program tabs should add up to the **Budget Plan Summary** tab, **Summary of Programs** tab, and **Summary of Budget Categories** tab. It is the responsibility of the applicant to ensure the accuracy of submitted budget plans, including, but not limited to additionally inserted program tabs and the project as a whole.
  - d) Note that the applicant, if selected, shall track and report actual results to the HTA in a manner consistent with budget plans described in this RFP or in a format to be prescribed by the HTA.

## Budget Plan Summary

MMA: \_\_\_\_\_

CY 2021  
Budget

Total Advertising	\$	-
Total Public Relations and Promotions	\$	-
Total Trade Marketing	\$	-
Total Research	\$	-
Total Hawaiian Culture Integration	\$	-
Total Staffing & Office	\$	-
Total Contractor Profit/Retainer	\$	-

Total \$ -





















<b>Secondary Research</b>	Airline Research	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	Competitive Research	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	Consumer Research Subscriptions	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	Market Trends - Conditions - Economic Research	-	-	-	-	-	-	-	-	-	-	-	-	-	-
<b>Advertising Research</b>	Ad/Message Testing	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	Consumer Research - Consumer focus groups	-	-	-	-	-	-	-	-	-	-	-	-	-	-
<b>E-marketing Research</b>	E-Marketing - E-mail - Metrics	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	E-Marketing - Online Marketing - Metrics	-	-	-	-	-	-	-	-	-	-	-	-	-	-
<b>Social Media Research</b>	Social Media Metrics	-	-	-	-	-	-	-	-	-	-	-	-	-	-
<b>Evaluation</b>															
<b>Analysis</b>	Program Evaluation	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	Existing in-market research	-	-	-	-	-	-	-	-	-	-	-	-	-	-
<b>Other Research</b>															
<b>Other Research</b>	Ad Hoc Research & Projects	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	Seminars, Presentations, Communications	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	Trade Research	-	-	-	-	-	-	-	-	-	-	-	-	-	-
		-	-	-	-	-	-	-	-	-	-	-	-	-	-
<b>Agency Fees</b>															
<b>Agency Fees</b>	Agency Fees	-	-	-	-	-	-	-	-	-	-	-	-	-	-
<b>Research Totals</b>															
<b>5) Hawaiian Culture Integration</b>															
<b>Entertainment</b>															
Entertainment	Musician(s)	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	Dancer(s)	-	-	-	-	-	-	-	-	-	-	-	-	-	-
<b>Other</b>															
<b>Other</b>	Lei	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	Décor	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	Attire	-	-	-	-	-	-	-	-	-	-	-	-	-	-
<b>Hawaiian Culture Integration Totals</b>															
<b>PROGRAM TOTALS</b>															



















<b>Secondary Research</b>	Airline Research	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	Competitive Research	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	Consumer Research Subscriptions	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	Market Trends - Conditions - Economic Researc	-	-	-	-	-	-	-	-	-	-	-	-	-	-
<b>Advertising Research</b>	Ad/Message Testing	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	Consumer Research - Consumer focus groups	-	-	-	-	-	-	-	-	-	-	-	-	-	-
<b>E-marketing Research</b>	E-Marketing - E-mail - Metrics	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	E-Marketing - Online Marketing - Metrics	-	-	-	-	-	-	-	-	-	-	-	-	-	-
<b>Social Media Research</b>	Social Media Metrics	-	-	-	-	-	-	-	-	-	-	-	-	-	-
<b>Evaluation</b>															
<b>Analysis</b>	Program Evaluation	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	Existing in-market research	-	-	-	-	-	-	-	-	-	-	-	-	-	-
<b>Other Research</b>															
<b>Other Research</b>	Ad Hoc Research & Projects	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	Seminars, Presentations, Communications	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	Trade Research	-	-	-	-	-	-	-	-	-	-	-	-	-	-
<b>Agency Fees</b>															
<b>Agency Fees</b>	Agency Fees	-	-	-	-	-	-	-	-	-	-	-	-	-	-
<b>Research Totals</b>															
<b>5) Hawaiian Culture Integration</b>															
<b>Entertainment</b>															
Entertainment	Musician(s)	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	Dancer(s)	-	-	-	-	-	-	-	-	-	-	-	-	-	-
<b>Other</b>															
<b>Other</b>	Lei	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	Décor	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	Attire	-	-	-	-	-	-	-	-	-	-	-	-	-	-
<b>Hawaiian Culture Integration Totals</b>															
<b>PROGRAM TOTALS</b>															

MMA: \_\_\_\_\_

**Hawaii Tourism Authority  
2021 MMA Budget Plan Worksheet: ADMINISTRATIVE**

		Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Yar
		Budget	Budget	Budget	Budget	Budget	Budget	Budget	Budget	Budget	Budget	Budget	Budget	Budget
<b>5) Staffing &amp; Office</b>														
<b>Staffing</b>														
<b>Staffing</b>	Compensation - Sales & Marketing	-	-	-	-	-	-	-	-	-	-	-	-	-
	Compensation - Admin	-	-	-	-	-	-	-	-	-	-	-	-	-
<b>Marketing &amp; PR Professional Services</b>	Subcontractors	-	-	-	-	-	-	-	-	-	-	-	-	-
<b>Professional Services</b>	Other Professional Services	-	-	-	-	-	-	-	-	-	-	-	-	-
	Temporary Services (non-admin)	-	-	-	-	-	-	-	-	-	-	-	-	-
<b>Professional &amp; Admin Support Services</b>	Accounting Services	-	-	-	-	-	-	-	-	-	-	-	-	-
	Data Processing Services	-	-	-	-	-	-	-	-	-	-	-	-	-
	Employee Functions	-	-	-	-	-	-	-	-	-	-	-	-	-
	Professional Development & Training	-	-	-	-	-	-	-	-	-	-	-	-	-
	Professional Services - Legal	-	-	-	-	-	-	-	-	-	-	-	-	-
	Professional Services - Audit/tax	-	-	-	-	-	-	-	-	-	-	-	-	-
	Professional Services - Internal Audit	-	-	-	-	-	-	-	-	-	-	-	-	-
	Professional Services - Administration	-	-	-	-	-	-	-	-	-	-	-	-	-
	Temporary Services - Administration	-	-	-	-	-	-	-	-	-	-	-	-	-
<b>Travel</b>														
<b>Travel In City</b>	Travel In City - Administration	-	-	-	-	-	-	-	-	-	-	-	-	-
	Travel In City - Program Related	-	-	-	-	-	-	-	-	-	-	-	-	-
<b>Travel Out of City</b>	Travel Out of City - Program Related	-	-	-	-	-	-	-	-	-	-	-	-	-
<b>Office Expenses</b>														
<b>Fixed Office Expense</b>	Office Rent	-	-	-	-	-	-	-	-	-	-	-	-	-
	Janitorial	-	-	-	-	-	-	-	-	-	-	-	-	-
	Rent	-	-	-	-	-	-	-	-	-	-	-	-	-
	Utilities	-	-	-	-	-	-	-	-	-	-	-	-	-
<b>Financing Costs</b>	Interest	-	-	-	-	-	-	-	-	-	-	-	-	-
<b>Equipment &amp; Office Supplies</b>	Computer Hardware/Software	-	-	-	-	-	-	-	-	-	-	-	-	-
	Alterations & Equipment	-	-	-	-	-	-	-	-	-	-	-	-	-
	Equipment Rent	-	-	-	-	-	-	-	-	-	-	-	-	-
	Equipment Repairs & Maintenance	-	-	-	-	-	-	-	-	-	-	-	-	-
	Misc. Fees & Services Charges	-	-	-	-	-	-	-	-	-	-	-	-	-
	Miscellaneous Administration	-	-	-	-	-	-	-	-	-	-	-	-	-
	Monthly Parking	-	-	-	-	-	-	-	-	-	-	-	-	-
	Stationary and Supplies	-	-	-	-	-	-	-	-	-	-	-	-	-
	Storage & Delivery	-	-	-	-	-	-	-	-	-	-	-	-	-
	Telephone, Fax, Cell Phones & Pagers	-	-	-	-	-	-	-	-	-	-	-	-	-
<b>Insurance</b>	Insurance	-	-	-	-	-	-	-	-	-	-	-	-	-
<b>Sales</b>														
<b>Sales Tools</b>	Amenities	-	-	-	-	-	-	-	-	-	-	-	-	-
	Dues	-	-	-	-	-	-	-	-	-	-	-	-	-
	Mail & Postage	-	-	-	-	-	-	-	-	-	-	-	-	-
	Marketing Co-op Sales Effort	-	-	-	-	-	-	-	-	-	-	-	-	-
	Parking Validation	-	-	-	-	-	-	-	-	-	-	-	-	-
	Subscriptions	-	-	-	-	-	-	-	-	-	-	-	-	-
<b>Other</b>														
		-	-	-	-	-	-	-	-	-	-	-	-	-
<b>Staffing &amp; Office Totals</b>														
<b>6) Contractor Profit/Retainer</b>														
<b>Contractor Profit/Retainer</b>	Contractor Profit/Retainer	-	-	-	-	-	-	-	-	-	-	-	-	-
<b>ADMINISTRATIVE TOTALS</b>														
<b>- - - - - - - - - - - - - - - -</b>														

2021 MMA BMP LEISURE - PERFORMANCE MEASURES

Major Market Area: \_\_\_\_\_

For Leisure Measures, only Semi-Annual and Annual targets are required. All targets are subject to HTA's Approval.  
 Note: All monthly actuals are tracked and reported to HTA along with YTD numbers.

	Annual Target	Semi-Annual Targets		Monthly Targets												
		2021	Jan-Jun	Jul-Dec	Jan	Feb	Mar	Apr	May	June	July	Aug	Sept	Oct	Nov	Dec
<b>LEISURE MEASURES</b>																
<b>Consumer Ad Measures</b>																
TV Reach																
Print Reach																
Digital Reach																
Radio Reach																
TV Gross Impressions																
Print - Total Audited Circulation																
Digital Gross Impressions - Total Audience																
Radio Gross Impressions																
Out of Home Gross Impressions																
<b>Travel Trade Ad Measures</b>																
Print - Total Audited Circulation																
Digital Gross Impressions - Total Audience																
<b>Consumer Shows</b>																
No. of Shows																
Show Attendance																
<b>Public Relations Measures</b>																
No. of Media/PR Calls																
No. of Press Releases Issued																
...Publicity Value																
Print																
Online																
Broadcast																
...Number of Impressions																
Print																
Online																
Broadcast																
...Media FAMs/Press Trips																
No. of Group Media FAMs																
No. of Articles Generated																
No. of Individual Press Trips																
No. of Articles Generated																
<b>Leisure Travel Trade</b>																
...Trade Shows																
No. of Trade Shows																
No. of Appointments																
...Travel Trade FAMs																
No. of Travel Trade FAMs																
No. of Participants																
...Trade Education																
No. of Trade Education Sessions																
No. of Participants																
No. of Agents Completed Online Training Program																
<b>Industry Collaboration</b>																
No. of Meetings with Hawai'i Industry Partners																
No. of Hawai'i Industry Partners Met With																
<b>Social Media Metrics</b>																
<b>FACEBOOK</b>																
Total Impressions Gained																
Total Interactions Gained																
Total Fan Count																
Increase in Fans																
Total Posts																
<b>INSTAGRAM</b>																
Total Impressions Gained																
Total Interactions Gained																
Total Fan Count																
Increase in Fans																
Total Posts																













## FORM 1: Conflicts of Interest Disclosures and Attestations

HTA policies require the analysis and mitigation of Organizational Conflicts of Interest (OCI). The individual contractor’s reputation for integrity is a critical asset in performing government contract work. The Procurement Officer will use your answers to this questionnaire to identify and further evaluate the impacts of potential conflicts of interest and your proposed mitigation plans.

The form consists of two sections.

- The first section asks yes/no questions designed to reveal any possible conflicts you may have. If you answer “yes” to any of these questions you will need to provide an attachment with additional information, including persons or entities involved, the nature of the activity, and an estimate of the percentage of this contract that could be impacted by that activity, and any mitigation measures you have in place or plan to implement. Answering “yes” to any question will not automatically disqualify you. The explanations provided by you will allow HTA to evaluate the potential impacts of these conflicts and to analyze the respective mitigation plans. The Procurement Officer may consider applicant’s candor, or lack thereof, in evaluating applicant’s responsiveness and responsibility. Omission or misrepresentation may be grounds for disqualification.
- The second section is a list of affirmative statements that an authorized signer must initial agreement to. An authorized signer is someone who is authorized to legally and financially bind the company.

The first person "you," and the third person “we” and “our,” as used below, represent the individuals and organizations making a proposal under this RFP. The term "your associates" as used below includes any members of your board of directors, association members, partners, officers, employees, volunteers, agents, consultants, subcontractors, clients, customers or other associates who may benefit from or be involved in the performance of this contract.

Yes	No	QUESTIONS. (If answered “yes,” explanation must be attached.)
		<b>1. Tourism Industry Members.</b> Are you or your associates primarily and directly employed in or employed by the tourism, travel, transportation, or hospitality industry outside of Hawaii?
		<b>2. Destination Specific.</b> Are you or your associates primarily and directly employed in or employed by any specific entities within Hawai’i, such as cities, counties, islands, hotels, resorts, restaurants, retail, transportation companies, attractions, activities, entertainment or cultural facilities?
		<b>3. Other Relationships.</b> Do you or your associates have any existing or planned relationships (direct or indirect, including financial, organizational, contractual or otherwise) with any entity other than HTA that could affect in any way your performance under this contract?
		<b>4. Competing Markets.</b> Do you or your associates perform work for, or have a direct or indirect relationship with, any entity responsible for or providing destination marketing services to any destination that may be a competitor to Hawai’i?

		<b>5. State Contracts.</b> Do you or your associates currently have, or have you had during the last six years, any arrangements (for example, contracts and cooperative agreements) awarded, administered, or funded--wholly or partly--by the HTA or any other Hawai'i state or local government or agency which are in any way related this solicitation?
		<b>6. Restrictions.</b> Do you or your associates have any contracts, agreements, special clauses, legal prohibitions or other arrangements that may restrict your effort or independent judgment in proposing or performing any part of the work that you may need to perform under this solicitation?
		<b>7. Other Conflicts.</b> Are you aware of any other potential conflicts of interest not described above?
		<b>8. Mitigation Plans.</b> To avoid what you perceive as a possible organizational conflict of interest, do you propose to: exclude associates from portions of the proposed work; employ any special contract clauses; or take other measures? Please provide details.

ATTESTATIONS	Initial of Authorized Signer
<b>10. Self-Dealing.</b> We will not engage in self-dealing, meaning that no work or effort performed under this contract will be used for our own benefit or to provide special access or benefits to our associates.	
<b>11. Access to Information.</b> We will not utilize non-public information acquired in the performance of the proposed work—such as data generated under the contract, information concerning HTA plans and programs, or the confidential and proprietary data of others—for non-HTA activities,	
<b>12. Biased Ground Rules.</b> We were not involved in preparing the requirements, developing the specifications, or drafting the statement of work for this solicitation.	
<b>13. Proposal Accuracy.</b> We acknowledge and certify that the information contained in this proposal and application is true and correct to the best of our knowledge and has been duly authorized by the governing body of the organization.	
<b>14. General Conditions as Amended.</b> We accept the State's General Conditions (see APPENDIX 1, Attachment 1: HTA Website References – Hawai'i State General Conditions) as amended in this RFP by the HTA, without exception.	
<b>15. Financial Resources.</b> There is often a delay between services and payment, so the contractor agrees to utilize its own financial resources to fund at least two months of the services described in its Brand Management Plan and Budget.	

I hereby certify that I have authority to represent my organization, if applicable, and that, to the best of my knowledge and belief, the facts and representations presented this questionnaire and on the pages of the attached explanations are accurate and complete.

**CONTRACTOR:**

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(Signature)

(Date)

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(Print Name and Title)

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(Company)

Number of Pages attached: