



**REQUEST FOR PROPOSALS
TO CONDUCT A RESIDENT SENTIMENTS ON
TOURISM SURVEY**

Solicitation No. RFP-09-07

DEADLINE FOR SUBMISSION: March 4, 2009
Must be delivered or received by 4:30 p.m. Hawaiian Standard Time
on this date

Issued by:

**HAWAI'I TOURISM AUTHORITY
STATE OF HAWAI'I
Hawai'i Convention Center, First Level
1801 Kalākaua Avenue, Honolulu, Hawai'i 96815**

February 13, 2009

HAWAI'I
TOURISM AUTHORITY



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A. BACKGROUND

1. Hawai'i Tourism Strategic Plan: 2005-2015

The Hawai'i Tourism Authority (HTA) is a government agency established by the State of Hawai'i vested with various powers and duties, including the duty to develop, coordinate, and implement state policies and directions for tourism and related activities taking into account the economic, social, and physical impacts of tourism on the State and its natural resources. In this capacity, the HTA assisted in the development of the *Hawai'i Tourism Strategic Plan: 2005-2015 (TSP)*. (The *TSP* is incorporated herein by reference and is available for inspection on the internet through the following website: www.hawaiiitourismauthority.org/pdf/tsp2005_2015_final.pdf.)

The *TSP* describes nine tourism strategic initiatives, including the "Research and Planning" initiative. The goal for this initiative is to "perform collaborative research and planning for use in the development of programs, policies and plans that will positively contribute to the State's economy, benefit the community and sustain Hawai'i's resources." Among the various objectives being implemented through this initiative is the objective of identifying, monitoring and addressing tourism trends, including impacts and benefits on the State and each community.

2. Resident Sentiments on Tourism Survey

One of the priorities established by the HTA is to conduct research related to understanding and measuring resident attitudes towards tourism in Hawai'i. Related to this research is the resident sentiment survey conducted since 1999 that provides valuable insight into resident attitudes – both positive and negative – relating to Hawai'i's visitor industry, including products and programs that are supported by the HTA with tourism revenues.

This survey is also cited in the *TSP* as one of four high-level performance measurements to be used in helping to assess progress being made in implementing various elements of the *TSP*. After the first survey was conducted in 1999, additional surveys were conducted

in 2001, 2002, 2005, 2006 and 2007. These surveys provide invaluable historic and trend data that is used by the HTA and various stakeholders.

Beginning in 2009, HTA desires to conduct future resident sentiment surveys using methods or processes that will enhance the relevancy of the information, while maintaining the validity, reliability, and comparability of previous surveys.

B. OBJECTIVES

The purpose of this solicitation is to achieve the following objectives:

1. To “track” key resident sentiments toward tourism in Hawaii over time;
2. To identify residents’ primary perceived negatives and positives of tourism’s impact on residents;
3. To identify future visitor industry and HTA priorities for residents; and,
4. To identify survey methods or processes that will enhance the relevancy of the survey.

C. SCOPE OF WORK

In addition to other requirements provided in this solicitation, and in any contract executed between the selected contractor and HTA, the selected contractor shall provide, without limitation, the following elements within the total scope of work described below and required to be performed during the Contract Term stated below.

1. Contractor shall identify and describe methods or processes related to fielding, analysis or other related work, while still achieving the aforementioned objectives.
2. Contractor shall obtain statewide sentiments or input on tourism from a representative sample of randomly selected respondents whose demographics are representative of Hawai‘i’s population and weighted to reflect area populations for each county, including Lāna‘i and Moloka‘i residents from Maui County. Contractor shall analyze and present its findings on a statewide and county basis.
3. Contractor shall review and utilize data from previous resident sentiment surveys where applicable, to track key resident sentiments toward tourism over time. The 2007 Resident Sentiment Survey, associated data tables and other information is available for inspection at:
http://www.hawaiiitourismauthority.org/index.cfm?page=1rp_reports&level1=research_planning. Note: Resident sentiment surveys from previous years will be made available to the selected contractor.
4. Contractor shall provide ongoing consultation with the HTA to ensure survey progress and attainment of project objectives, as well as obtain HTA approval on the final survey instrument, final report and any presentations.

5. Contractor shall provide a final report and/or completed survey of resident sentiments on tourism on a yearly basis and no later than June 15 of each year during the Contract Term. HTA will also have complete ownership of all related project data.

D. CONTRACT TERM

The selected contractor shall begin work upon the execution of a contract. Unless otherwise provided in offeror's accepted proposal, the term of the contract shall terminate on July 31, 2011.

E. QUALIFICATIONS

Respondents shall provide satisfactory and credible proof of their capacity, capability and expertise to perform the scope of work described herein, including the following proof of qualifications:

1. Demonstrated financial capacity to perform all elements of the Scope of Work described herein in a timely and efficient manner;
2. Competent and credible level of knowledge related to market research and the Hawai'i visitor industry; and,
3. Demonstrated expertise necessary to perform the scope of work described herein.

F. OFFICIAL POINT OF CONTACT AND INFORMATION REQUESTS

1. **Official Point of Contact.** The HTA's Official Point of Contact regarding the administration of this solicitation is as follows:

Momi Akimseu
Strategic Planner
Hawai'i Tourism Authority
Hawai'i Convention Center, First Level
1801 Kalākaua Avenue
Honolulu, Hawai'i 96815
Telephone: (808) 973-2278/Email: makimseu@hawaiiitourismauthority.org

2. **Requests for Information**

- a. Requests for information or questions regarding this solicitation should be addressed to the Official Point of Contact by email. Requests for information not found herein shall be posted on HTA's website at www.hawaiiitourismauthority.org (click on "RFPs" to questions).
- b. All interested offerors desiring to receiving notice of any addendums or responses via

email shall provide the Official Point of Contact with the offeror's email address.

G. SOLICITATION SUBMISSION

1. Proposal Requirements

An offeror shall provide one (1) original (marked as such and including an original signature executed in ink, preferable in blue ink) and three (3) copies of proposal in a clearly sealed envelope marked with the offeror's name, address, and the reference number to this RFP and consisting of all the information and documents requested by this solicitation below.

- a. **Cover letter.** A cover letter written on offeror's official business letterhead stationary indicating the offeror's exact legal name that is signed and dated by an individual authorized to legally bind the offeror and specifically identifying all the contents being submitted to the HTA for evaluation under this RFP.
- b. **Qualification statement.** A narrative describing the offeror's background and qualifications in providing the Scope of Work previously described herein; the qualifications of offeror's personnel to be assigned to this project; any subcontractors or sub-consultants, including a brief history of their respective background and experience; and, any other information an offeror deems relevant for an evaluation of the required qualifications to perform the objectives in this RFP.
- c. **Work plan.** A detailed and complete work plan describing the development and completion of a yearly survey over a three year period and within the Contract Term provided herein, including a description of how the offeror will be able to manage the completion of the survey project and achieve the stated objectives of this RFP. The work plan shall include a narrative describing the recommended methodology, including any methods and/or processes not currently utilized and that enhances the relevancy of the survey, while maintaining the validity, reliability and comparability of previous surveys. An offeror shall utilize the methods and processes provided in the Resident Sentiment Survey conducted in 2007 as the basis for describing any new methods and/or processes. For purposes of this solicitation and evaluation, HTA has established the following:
 - 1) Minimum number of respondents required to be surveyed on a state-wide basis: 1,600; and,
 - 2) Total Cost for the 2007 Resident Sentiment Survey: \$39,100.00.
- d. **Timeline.** A detailed timeline with key milestones to ensure completion of the survey project within the Contract Term provided herein.
- e. **Budget.** An itemized budget of all fees and costs for providing all of the elements of the Scope of Work previously described herein. For purposes of this solicitation and evaluation, an offeror shall also provide a "not to exceed" amount, tax inclusive, for the total cost to conduct three resident sentiment surveys during the Contract Term.
- f. **Financial statement.** One (1) copy of the offeror's most recent financial statement, certified as to its accuracy by an officer of the organization.

2. Due Date and Place of Submission

- a. Proposals in response to this RFP are due by **4:30 p.m., Hawaiian Standard Time, on Wednesday, March 4, 2009** and shall be delivered to the following address:

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

- b. No proposal or document submitted in response to this solicitation shall be considered if received after the stated date and time herein. Offerors are cautioned to make and confirm prior arrangements to ensure timely delivery and receipt of the proposals before the due date. Proposals delivered by postal mail service must be received (not postmarked) before the due date and time. An offeror shall assume full responsibility for timely delivery of the proposals and documents required under this RFP. The time clock/stamp at the HTA office shall be the official clock for determining timely receipt of a submission.
3. **No Electronic Submission.** Any proposal or documents submitted in response to this solicitation via internet, email, facsimile transmission, or any form of electronic submission shall be rejected and not accepted for evaluation by the STATE.
4. **Incurred Expenses.** The STATE is not responsible for any expenses that an offeror may incur in preparing and submitting proposals and/or conducting required presentations. The STATE is not liable for any costs or claims incurred by any offeror in connection with the submission of offeror's proposal and/or presentation, including without limitation the costs related to travel and accommodations.
5. **Amendment to RFP.** If it becomes necessary to revise or amend any part of this RFP, then the STATE will furnish any revision via email to all prospective offerors who provide the HTA its email address upon receipt of this RFP. Offerors shall be responsible for inspecting the HTA's website at www.hawaiitourismauthority.org for notice of any amendment to the RFP.
6. **Proprietary Information.** Any trade secret or proprietary information submitted as part of any response to this solicitation that offeror expressly and affirmatively marks as confidential will be maintained as such to the extent permissible under Hawaii law, including Hawaii's Uniform Information Practices Act (Modified) proscribed in chapter 92F, Hawaii Revised Statutes, and incorporated herein by reference. For all confidential materials, offeror shall state the reason(s) why the protection is necessary and what harm offeror will suffer if the information was publicly disclosed.

7. **Public Funds.** Offeror acknowledges and agrees that this solicitation and any contract executed pursuant to this solicitation are subject to the availability of public funds. The offeror acknowledges and agrees that the STATE reserves the right to terminate this solicitation and any contract upon prior notice that the HTA lacks public funding, which affects its ability to implement the funding priorities established by the HTA, and that the contractor waives any claim for any actual, consequential and liquidated damages, if any, arising from said termination.
8. **Waiver of Irregularity.** An offeror shall carefully review this solicitation for defects and questionable or objectionable matter. Comments concerning defects and questionable or objectionable matter shall be promptly submitted to the HTA prior to the deadline for submitting any submission. This shall allow issuance of any necessary amendments to the solicitation and shall help prevent the evaluation of a defective solicitation. Offeror hereby acknowledges, agrees, waives and shall be stopped from raising any claim arising from any knowledge of any defect in this solicitation and failing to timely inform the HTA. The offeror further acknowledges and agrees that HTA reserves the right to waive any technical irregularity not affecting an unbiased and objective evaluation of all submissions; that such waiver will be in the best interest of the State of Hawaii; and, that respondent hereby waives any claim against the HTA arising from such technical irregularity.

H. EVALUATION PROCESS AND CRITERIA

1. **Evaluation Process.** An evaluation committee will be established to evaluate all proposals based upon the evaluation criteria provided below. Upon initial evaluation of all proposals, the HTA shall have the option to select responsible offerors for a priority list to provide an oral presentation to the evaluation committee for further evaluation of an offeror's ability to achieve the objectives of this RFP. Unless a responsible offeror has submitted a proposal deemed to be acceptable or potentially acceptable, the HTA is under no obligation to allow every offeror to be on a priority list. If there are numerous acceptable and potentially acceptable proposals, the evaluation committee may rank the proposals and limit the priority list to at least three responsible offerors who submitted the highest-ranked proposals. Proposals may be accepted on evaluation without an oral presentation. Following any oral presentations, the HTA may negotiate a best and final offer with the priority-listed offerors. The award of the contract shall be issued to the responsible offeror whose proposal is determined to provide the best value to the State taking into consideration price and the evaluation criteria provided below.

2. Evaluation Criteria

The HTA reserves the right to reject any proposal, which is not responsive to the requirements provided in this solicitation. The HTA, through its evaluation committee, reserves the right to reject any and all proposals or to waive any minor irregularities when doing so is in the best interest of the State of Hawai‘i. The evaluation criteria and the associated points are listed below.

The total number of points used to score a proposal is 100.

a. Qualifications (10 points).

- (1) **5 points.** The offeror has also clearly demonstrated its qualifications and financial capacity to achieve the objectives of this solicitation by providing credible proof of its qualifications.
 - (a) Number of years in business.
 - (b) Number of years performing similar services described in this RFP.
 - (c) Annual billings and annual reports.
 - (d) Sample projects.
 - (e) Letters of reference and client listing.
- (2) **5 points.** The qualifications, experience, and expertise of the key individuals and/or subcontractors or sub-consultants managing and/or performing the scope of work conveys a high degree of professionalism and confidence in the offeror’s ability to provide quality work products.
 - (a) Listing of key personnel and associated resumes for those who will be dedicated to this project.
 - (b) Demonstrated ability to communicate effectively in writing through the written documents submitted in response to this RFP that are clear, unified, organized, structured, focused and functional. The written documents must sustain and support an idea linked by logic and be understandable to the intended audience.

b. Work Plan (65 points).

Offeror’s responsiveness and capability to achieve the objectives of this solicitation and to satisfactorily perform every element of the Scope of Work described herein is clearly demonstrated in its work plan and/or proposal by the following:

- (1) **10 points.** The quality, thoroughness, and cohesiveness of the proposal and/or work plan;
- (2) **20 points.** The offeror’s ability to clearly describe in its work plan the manner in which it will completely and timely fulfill the Scope of Work, including a detailed timeline with key milestones to ensure completion of each study within the Contract Term provided herein; and,
- (3) **35 points.** The offeror has provided viable recommendations of new methods or processes for the conduct of resident sentiment surveys on tourism that enhances the relevancy of the survey, while maintaining the validity and reliability of the survey.

c. Price (25 points).

Offeror has provided an itemized budget of all fees and costs for providing all of the elements of the Scope of Work previously described herein that includes a “not to exceed amount” for the total cost, tax inclusive, to conduct three resident sentiment surveys during the Contract Term.

- (1) The proposal that has the lowest cost will receive the maximum points for price.
- (2) Points allocated to the higher-priced proposal must be equal to the lowest priced proposal multiplied by the maximum points available for price and divided by its proposal price.
- (3) Formula to determine points assessed to price:
 - 25 points = maximum points assessed to price
 - Assuming:
 - A = Offeror with the lowest proposal price = 25 points
 - B = Offeror with the next lowest proposal price
 - Formula: Points allocated to B = $\frac{(A \text{ proposal price} \times 25 \text{ points})}{B \text{ proposal price}}$
 - Hypothetical: If A = \$50,000 proposal price
B = \$75,000 proposal price
Points allocated to B = $\frac{(\$50,000 \times 25 \text{ points})}{\$75,000} = \frac{1,250,000}{\$75,000} = 16.33$

I. CONTRACTING PROCESS

1. **Notice of Award.** Upon final evaluation of the offerors and final negotiations of a best and final offer with the HTA, a notice of award will be issued to the selected respondent, who shall immediately work with the HTA to promptly execute a written contract incorporating the relevant specifications and requirements of this solicitation; the offeror’s qualification statement; the final negotiated compensation and method of payment; the term and scope of work; any other representation made by the offeror to the HTA; and, the State of Hawaii’s general terms and conditions. Offeror acknowledges and agrees that if selected as the contractor, the State of Hawaii General Conditions (Form AG-008 Rev. 8/29/2008), as amended from time to time and incorporated herein by reference, shall be part of the contract to be executed between the contractor and HTA. (A copy of the General Conditions may be inspected at <http://www4.hawaii.gov/StateForms/Internal/ShowInternal.cfm?&ShowAll=Yes>, click on ag008.doc.)
2. **Tax Clearance.** State law mandates that a government agency shall not execute a contract with any contractor who has not previously provided a tax clearance certificate. As a prerequisite to entering into a contract with the HTA, offeror shall immediately obtain a tax clearance certificate from the Hawaii Department of Taxation (DOTAX) and the Internal Revenue Service (IRS) to the effect that all tax returns due have been filed, and all taxes, interest, and penalties levied against the offeror or accrued have been paid.

- a. It is recommended that the "Tax Clearance Application," Form A-6, be completed and submitted to the DOTAX at the time the proposal is submitted or as soon as possible, as **the request may take 21 calendar days to process.**
 - b. The application for a tax clearance certificate may be obtained by requesting a Tax Clearance Application, Form A-6, at the District Offices in Hawaii of the DOTAX. The tax clearance application may also be obtained, completed, and submitted on-line through the DOTAX website at <http://www.state.hi.us/tax/alphalist.html#a>. The application for a tax clearance is the sole responsibility of the offeror and must be submitted directly to the DOTAX. However, the original and completed tax clearance certificate shall be submitted to the HTA. Applicant should request a clearance for a "State contract" to ensure both the DOTAX and IRS clearance stamps are issued.
 - c. On-line clearance may be acceptable for those offerors who meet the requirements of the DOTAX for this method of clearance certification. Information on the Hawai'i Compliance Express program may be found at:
<https://vendors.ehawaii.gov/hce/splash/welcome.html> or
<http://www.ehawaii.gov/dakine/index.html>.
 - d. If a offeror's proposal is selected for funding, an updated tax clearance certificate may be required if the tax clearance certificate on file has expired. For purposes of contract execution, a tax clearance certificate is valid for six (6) months. Failure to provide an acceptable tax clearance certificate will preclude the HTA from executing a contract with offeror and may be result in the cancellation of the award.
 - e. A final tax clearance certificate will be required to process the final payment. To meet this requirement and to allow for processing time, a current, original or certified original tax clearance, dated no earlier than 45 days from the date of submission of all final documents, issued by the State of Hawai'i and the federal Internal Revenue Service, must be submitted with the final documents, including the final request for payment.
3. **Execution of Contract.** Upon the receipt of all required information, documentation, attachments, and tax clearance, the offeror and the HTA shall execute a final written contract. Offeror may not perform any work prior to the execution of a written contract by the HTA and the respondent. All unauthorized work performed by the offeror prior to the execution of the written contract shall be at the offeror's sole cost and expense.
 4. **Public Disclosure.** Upon execution of the written contract, all documents submitted by the offeror and maintained by the HTA shall be subject to public inspection and copying under Hawaii's Uniform Information Practices Act (Modified) provided in chapter 92F, Hawaii Revised Statutes; provided that, any confidential commercial or proprietary information may be withheld. Offeror should identify and clearly mark the documents containing any confidential commercial or proprietary information in the manner previously discussed herein.

5. **Compliance with Law.** In addition to any statutory laws described or incorporated herein, offeror shall comply with any and all applicable State, County, and Federal statutes, regulations, codes, directives, and guidelines related to the performance of the contract, including any statutory law related to contracting with the State of Hawai‘i.
6. **Approvals.** By submitting a proposal, the offeror hereby acknowledges and agrees that any contract arising out of this solicitation shall be subject to the prior approval of the Department of the Attorney General as to form, and is also subject to all further approvals, if necessary or applicable, by the Governor, as it may be authorized by statute, rule, order, or directive.
7. **Campaign Contributions by State and County Contractors.** Contractors are hereby notified of the applicability of Section 11-205.5, Hawaii Revised Statutes, which states that campaign contributions are prohibited from specified State or county government contractors during the term of the contract if the contractors are paid with funds appropriated by a legislative body.

J. PROJECT TIMELEINE

In addition to the terms and requirements previously discussed and incorporated herein, and final negotiation of a contract with a selected contractor regarding key milestones for the timely implementation of this RFP, the offerors shall comply with the following Project Timeline:

February 25, 2009

Deadline to submit questions

February 27, 2009

Answers to questions posted on
www.hawaiiitourismauthority.org

March 4, 2009 at 4:30 p.m. (HST)

Proposals are due

The HTA reserves the right to shorten or extend the scheduled dates and times when doing so is in the best interest of the State of Hawai‘i.