

**Pre-Proposal Conference:
RFP 23-02 Hawai'i Tourism Destination
Brand Management & Marketing Services
for the Canada MMA**



Agenda

- Opening Protocol
- Introductions
- Overview of HTA & DMAPs
- Overview of RFP
- RFP Application Process & Schedule
- Resources
- Questions
- Closing Remarks

Opening Protocol

Housekeeping

- Please use the Q&A function and we will get to the questions at the end of the conference.
- This briefing is not a complete and comprehensive summary of all requirements of the procurement and offerors should refer to the RFP document and its attachments and outlines for complete details.

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Overview

of the Hawai'i Tourism Authority



The HTA Strategic Plan pillars, priorities and KPIs, DMAP priorities and actions, and the HTA board's commitment to the Aloha+ Challenge and the 'Āina Aloha Economic Futures Declaration are considered when designing and implementing all HTA programs and activities.

A photograph showing a person's hands holding a traditional wooden water container (kai) and pouring water onto a small tree sapling. The background is a natural, outdoor setting with grass and other plants. The image is overlaid with text in the top right and bottom right corners.

HAWAII TOURISM™

AUTHORITY

MĀLAMA KU‘U HOME
Through Regenerative Tourism:
HTA Change Management Plan



NATURAL RESOURCES PILLAR

*Respect for Our Natural
& Cultural Resources*



HAWAIIAN CULTURE PILLAR

*Support Native Hawaiian
Culture & Community*



COMMUNITY PILLAR

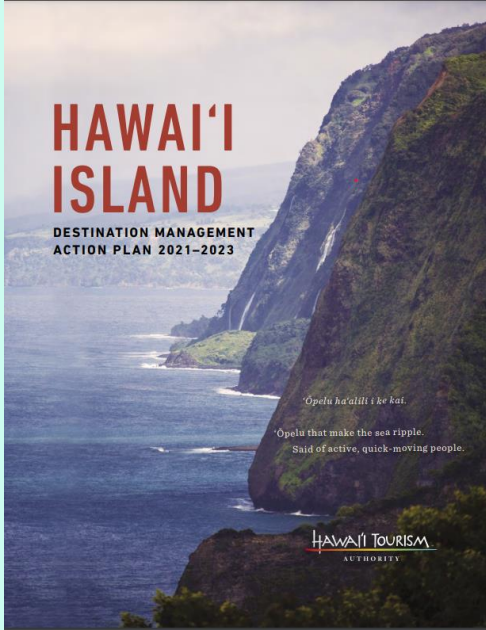
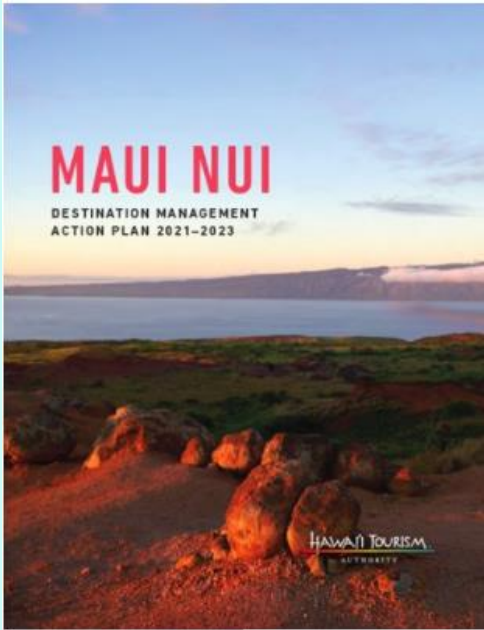
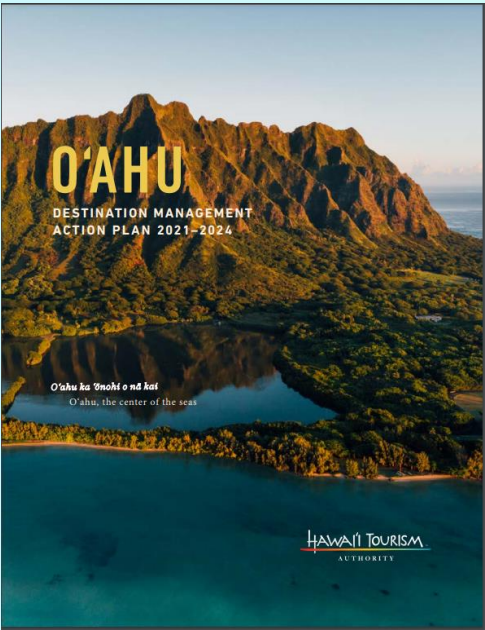
*Ensure Tourism & Communities
Enrich Each Other*




BRAND MARKETING PILLAR

*Strengthen Tourism's
Contributions*

Overview of Destination Management Action Plans



An aerial photograph of a tropical coastline. On the left, a steep, dark green mountain slope descends to a white sandy beach. A thin waterfall is visible on the left side of the mountain. The ocean is a vibrant turquoise color, with white waves crashing onto the shore. In the distance, more rugged, forested mountains rise from the water's edge under a bright blue sky with scattered white clouds.

Why did HTA Develop Destination Management Action Plans (DMAPs)?

- Outcome of the HTA's Strategic Plan 2025
- Address Resident Sentiment Survey
- Reset and rebuild visitor industry for that island
- Engage and Collaborate
- Improve current and develop new tourism products and offerings
- Establish better systems for destination management



HTA is committed to a solicitation process that is comprehensive, fair and impartial.

Visit HTA's RFP webpage at

Hawai'i State eProcurement System (HlePRO) at
<https://hiepro.ehawaii.gov/welcome.html>

or

<https://www.hawaiitourismauthority.org/rfps>

HTA Procurements

- HTA procurement practice is subject to
 - 103D Hawai'i Revised Statutes (HRS) as clarified under
 - 3-122 Hawai'i Administrative Rules (HAR), among others.
- Contracts are subject to the State's General Conditions which were attached to the RFP.
- The HTA procurement process—from solicitation through contract execution—is practiced and overseen by the Procurement Officer, with support from the Deputy Attorney General assigned to the HTA.

Important Dates

RFP 23-02 - Hawai'i Tourism Destination Brand Management & Marketing Services for the Canada MMA	
ACTIVITIES	SCHEDULED DATE
Release of Request for Proposals	March 14, 2023
Pre-Proposal Conference	March 17, 8:00 a.m. - 9:30 a.m. HST
Deadline to Submit Written Questions (must be submitted in HlePro)	March 20, 2023, 4:30 p.m. HST
State's Response to Written Questions (will be posted in HlePRO)	March 22, 2023
Deadline to Submit Notice of Intent to Offer	March 24, 2023, 4:30 p.m. HST
Proposal Due Date/Time, Evaluation Period Begins	April 21, 2023, 2:00 p.m. HST
Priority Listed Offeror Selection & Notification	Week of April 24, 2023
Oral Presentations with Priority Listed Offerors	May 5, 2023
Best and Final Offer Deadline (if necessary)	Week of May 8, 2023
Notice of Award	May 15, 2023
Start of Contract Performance	June 30, 2023
End of Initial Contract Term	December 31, 2025
End of 2-Year Option if Exercised	December 31, 2027

Electronic Submission to HlePRO Only

- The State will use HlePRO to issue the RFP, answer RFP questions, receive all offers, and issue any addenda to the RFP.
- Offers must be registered on HlePRO.
- Questions relating to this RFP, issues relating to the accessibility of this RFP, and requests for accommodations for persons with disabilities in connection with this RFP shall be communicated through HlePRO.
- As part of this procurement process, Offerors are informed that awards made for this solicitation, if any, shall be done through the HlePRO and shall therefore be subject to a mandatory .75% (.0075) transaction fee, not to exceed \$5,000 for the total contract term. The mandatory transaction fee shall be at the contractor's sole cost and expense.

Deadlines Strictly Enforced

- DO NOT WAIT UNTIL THE LAST MINUTE! If your submittals are slow to upload to HlePRO and miss the deadline of **April 21, 2023, 2:00 p.m. HST**, your proposal will not be opened.
- Offerors should allow ample time to review their submitted proposal, including attachments, prior to the proposal deadline.
- For technical assistance, please contact NIC Hawai'i at (808) 695-4620 or email at: nichawaii@egov.com.

Notice of Intent to Offer

- Registration is not required to submit a proposal but is highly encouraged
- By registering your company, any applicable Addenda will be sent to you.
- If interested in responding to this solicitation, please email the information specified below to procurement@gohta.net no later than **March 24, 2023, 4:30 p.m. HST.**

- Name of Company
- Name of Contact Person
- Email Address
- Company Address
- Telephone Number
- Solicitation (RFP) Number

Submission of Questions

- Any questions or concerns regarding the RFP should be submitted to HlePRO. prior to **March 20, 2023, by 4:30 p.m. HST** as noted in the RFP Schedule.
- Each question should cite the RFP page, section number, paragraph, and line or sentence that is the source of the question.
- HTA reserves the right to consolidate, reconfigure and address questions as it deems appropriate, or to disregard questions altogether.

Evaluation Committee

- The evaluation committee will include at least three (3) State employees as well as key stakeholders and industry experts.
- All evaluators sign an attestation declaring their impartiality and are sworn not to disclose any information on the process.
- Evaluator identities are kept confidential during the RFP process. Offerors who knowingly attempt to contact or otherwise influence any evaluator about this RFP will be disqualified.

Proposal Evaluation

EVALUATION CRITERION	Scoring Weight Maximum Score
<p>OVERALL CAPABILITIES OF FIRM & QUALIFICATIONS OF PERSONNEL</p> <p>The evaluation will include an assessment of the company, considering factors listed in Section 3 of this RFP and in SPO Form 21 (Qualifications Questionnaire), including but not limited to the depth of experience and demonstrated success with similar projects, capabilities and company resources, experience working with State, county, and federal agencies, and professional work experience in Hawai'i.</p> <p>The evaluation will also include an assessment of the qualifications, experience, and specific knowledge of Offeror's managerial team, staff, and subcontractors as it relates to the requirements of this RFP, and the full-time equivalent positions dedicated to the HTA account.</p>	25
<p>BRAND MARKETING PLANS (BMPs)</p> <p>The evaluation will include an assessment of the quality of the proposed marketing strategies, targets set for KPIs, performance measures, campaign/program creativity and innovation, and the value received such as the maximum services provided in relation to the administrative fees charged.</p>	25
<p>FAMILIARITY WITH HAWAI'I BRAND AND PRODUCT</p> <p>The evaluation will include an assessment of Offeror's understanding of the Hawaiian Islands, its people, the Native Hawaiian culture, Hawai'i's multi-ethnic culture and the HTA; and how Offeror integrates this knowledge throughout the proposal. _Note: this is not a separate section of the proposal but is an analysis of the whole proposal.</p>	25
<p>LONG-TERM VISION AND ROADMAP</p> <p>The evaluation will include an assessment of the quality of the proposed long-term vision and roadmap for 2023-2025 alignment with the HTA Strategic Plan pillars, priorities and KPIs, and the HTA board's commitment to the Aloha+ Challenge and the 'Āina Aloha Economic Futures Declaration.</p>	15
<p>COST</p> <p>In accordance with HAR §3-122-52 and HRS Chapter 103D, the proposal with the lowest cost factor, based on the total cost for the initial three-year contract period (not to exceed \$2,800,000.00), must receive the highest available rating allocated to cost. Each proposal that has a higher cost factor than the lowest must have a lower rating for cost. Additionally, the points allocated to higher-priced proposals must be equal to the lowest proposal price multiplied by the maximum points available for price, divided by the higher proposal price.</p>	10
TOTAL	100

Scoring Guidelines

Assessment	Scoring Guidelines	Total Score
Poor	<p>Proposal is inadequate in many basic aspects for the scored category</p> <p>Evaluator has very low confidence in the applicant's ability to perform as promised or as required</p>	0 – 19
Marginal	<p>Proposal minimally addresses the requirements, but one or more major considerations of the category are not addressed, or lacking in some essential aspects for the specific criteria</p> <p>Evaluator has low confidence in the applicant's ability to perform as promised or as required</p>	20 – 40
Adequate	<p>Proposal adequately meets the minimum requirements for the category and is generally capable of meeting the State's needs for specific criteria</p> <p>Evaluator has confidence in the applicant's ability to perform as promised or as required</p>	41 – 60
Good	<p>Proposal more than adequately meets the minimum requirements of the specific criteria, and exceeds those requirements in some aspects</p> <p>Evaluator has high confidence in the applicant's ability to perform as promised or as required</p>	61 – 80
Excellent	<p>Proposal fully meets all requirements and exceeds most requirements</p> <p>Evaluator has extremely high confidence in the applicant's ability to perform as promised or as required</p>	81 – 100

Public Information

- Proposals will become public information after the contract has been awarded.
- Portions of the proposal may be designated that contain TRADE SECRETS or PROPRIETARY data. The material designated must be clearly marked and readily separable from the proposal in order to facilitate public inspection. In addition, Offeror shall provide a list of all confidential information referenced in the Offeror's proposal including page number and sections in a separate attachment.
- However, claims of confidentiality will be subject to approval by the Hawai'i Attorney General's Office.

Two Phase Procurement Process – Round One

- The Procurement Officer, in accordance with Hawai'i Administrative Rules §3-122-53, will classify proposals as acceptable, potentially acceptable, or unacceptable. All responsible offerors who submit acceptable or potentially acceptable proposals are eligible for the priority list.
- In Round 1, the evaluation committee will evaluate and score all acceptable and potentially acceptable proposals using the criterion and scoring guidelines described in Section 4.2 of the RFP. The proposals will be ranked by combined-weighted score.
- The evaluation committee will then select no more than three (3) offerors from the highest ranked proposals who will advance to Round 2. These selected offerors will be referred to as “Priority Listed Offerors.”

Two Phase Procurement Process – Round Two

- In the second round, the Evaluation Committee may conduct discussions with Priority Listed Offerors and 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. The date for oral presentations is listed in the RFP Schedule found in Section 1. The evaluation committee reserves the right, but is not required, to perform reference checks.
- The evaluation criteria and scoring guidelines for Round 2 shall be those found in section 4.2 of the RFP. In this second round, evaluators will turn in new score sheets. The Round 2 score sheet shall reflect the evaluators overall assessment of the Offeror, inclusive of the written proposals in addition to the oral presentations and/or any clarifications from Round 2.

Award of Contract

- The contract will be awarded to the responsible Offeror whose proposal is determined to be the most advantageous to the State based on the evaluation criterion set forth in Section 4.2 of the RFP pursuant to HRS §103D-303(g).
- Responsibility of Offeror is outlined in Section 5 of the RFP, including the following:
 - A current Certificate of Vendor Compliance. Compliant CVC must be available at time of award and before a contract can be signed.
 - Updated cost or pricing data. Also, you may be required to sign Form SPO-013 certifying cost or pricing data if the procurement officer determines there is not enough price competition.

Contract Term

- Initial contract term ends on December 31, 2025 with the possibility of 1 two-year extension.
- By statute, maximum contract length is limited to 5 years.
- Each individual year is subject to the availability of funds.
- When the best interests of the State so require, the State may issue a stop work order, termination for default, or termination for convenience.

Compensation

- This is a Fixed-Price contract, inclusive of all taxes and expenses, for an amount **not to exceed TWO MILLION FOUR HUNDRED THOUSAND AND NO/100 DOLLARS (\$2,400,000.00 USD)** for the initial two-years and six months term of this multiterm contract. The total amounts shall not exceed:
 - A fixed price amount no greater than FOUR HUNDRED THOUSAND AND NO/100 DOLLARS (\$400,000.00 USD) for July through December 2023;
 - A fixed price amount no greater than ONE MILLION AND NO/100 DOLLARS (\$1,000,000.00 USD) for Calendar Year 2024 January through December;
 - A fixed price amount no greater than ONE MILLION AND NO/100 DOLLARS (\$1,000,000.00 USD) for Calendar Year 2025 January through December.
- With options at the sole discretion of HTA to provide incremental funding up to the amounts described below:
 - A fixed price amount no greater than TWO HUNDRED THOUSAND AND NO/100 DOLLARS (\$200,000.00 USD) for Calendar Year 2024 January through December;
 - A fixed price amount no greater than TWO HUNDRED THOUSAND AND NO/100 DOLLARS (\$200,000.00 USD) for Calendar Year 2025 January through December.
- Total maximum compensation, inclusive of all taxes, expenses and optional incremental funding is for an amount **not to exceed TWO MILLION EIGHT HUNDRED THOUSAND AND NO/100 DOLLARS (USD \$2,800,000)** for the multi-term contract. The contract amount for each year will be subject to the availability of funds as allocated by the legislature and approval by the HTA Board of Directors.
- Administrative costs inclusive of staffing and office expenses and contractor retainer must be included in the fixed amount and shall **not exceed 22%** of the total annual fixed price.

Base Funding

Jul-Dec 23	\$400,000
Jan-Dec 24	\$1,000,000
Jan-Dec 25	\$1,000,000
Totals	\$2,400,000

The availability of funds to HTA 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 the Department of Budget & Finance, State of Hawai'i, and final allocation and approval by the HTA Board of Directors. These amounts are an estimate and subject to the availability of funds, current market conditions, and other factors.

Incremental Funding

Jul-Dec 23	\$0
Jan-Dec 24	\$200,000
Jan-Dec 25	\$200,000
Total	\$400,000

The availability of funds to HTA 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 the Department of Budget & Finance, State of Hawai'i, and final allocation and approval by the HTA Board of Directors. These amounts are an estimate and subject to the availability of funds, current market conditions, and other factors.

Scope of Work

The key brand management & marketing objectives for this RFP are as follows:

- Primary focus on brand marketing in the Canada market.
- Brand marketing campaigns and programs shall be guided and informed by the Hawaiian values of aloha, mālama, ho‘okipa and kuleana.
- Drive destination brand awareness. Build the brand of the Hawaiian Islands as well as the specific islands of Kaua‘i, O‘ahu, Lāna‘i, Moloka‘i, Maui, and Hawai‘i Island.
- Take advantage of market insights and intelligence on trends, distribution dynamics, consumer insights, and competitive analysis. Target both current and next generation of mindful travelers. Encourage continued repeat travelers to come to Hawai‘i.
- Focus brand marketing to target mindful travelers with emphasis on lifetime trip expenditures and increasing per person per day expenditures in alignment with HTA’s KPIs.
- Collaborate with the visitor industry to leverage resources and optimize results.
- Maintain the cultural integrity of the Hawaiian language, customs and practices, cultural and historic sites, and imagery in all brand marketing initiatives.
- Increase awareness, familiarization, and understanding of the diversity of Hawai‘i’s people, place, and culture. This includes, but is not limited to, supporting Hawai‘i-based projects, programs, and initiatives in market at HTA’s direction.

Scope of Work

- Implement a responsible tourism branding communications program to educate visitors pre-arrival with specific information about safe and respectful/mindful travel. This program should be coordinated with the HTA's in-destination program to provide a seamless message throughout the entire visitor journey.
- Develop airline relationships with the goal of monitoring and optimizing load factors and to support routes as directed.
- Focus marketing and enhance tour product development to build a desire to visit during shoulder periods and encourage multi-island itineraries.
- Maintain a balance between travel trade and consumer promotions, backed by research regarding consumer destination travel shopping and buying trends.
- Assist HTA's Global MCI Contractor "Meet Hawai'i" in securing MCI group business with special focus on the state-owned Hawai'i Convention Center (HCC) and citywide convention growth.
- Emphasis should be to drive visitor spending into Hawai'i based businesses as a means to support a healthy economy, including supporting local businesses and promoting Hawai'i made products, Hawai'i festivals and events, agritourism programs, and voluntourism activities in partnership with HTA, DBEDT, the private sector, etc.
- Assist HTA and other designated entities in crisis management and communication related to the visitors and/or visitor industry.
- Collaborate and assist where appropriate, with approval by HTA, in supporting DMAP and regenerative tourism initiatives. Work with the community, the visitor industry, and other government agencies on visitor related issues.
- Explore and support various DBEDT initiatives as directed and approved by HTA.
- Ensure that initiatives are metrics-driven.

Proposal Format

- The format must be U.S. standard 8 1/2 by 11 inches.
- Orientation should be primarily portrait, though landscape is welcome for data or visual presentations as appropriate.
- Slide shows and PowerPoint Presentations will not be accepted.
- Video, audio or other similar multimedia materials will not be considered during evaluation of written proposals, although they may be accepted or even requested for those who advance to Round 2 of the procurement process.
- The body of the proposal must not exceed the page limit and file size outlined in the RFP.

Proposal Content

Items 1-11 to be individually labeled accordingly and submitted as one PDF file in the order listed below that is no more than one hundred (100) pages to be titled Offeror Name_Proposal Part 1:

- Cover Page
- Table of Contents
- Cover Letter
- Organizational Capacity
- Professional Experience
- 2023-2025 Long-Term Vision and Roadmap (narrative)
- 2023 Brand Marketing Plan (BMP)
- 2024 Brand Marketing Plan (BMP)
- 2024 Incremental Funding Brand Marketing Plan
- 2025 Brand Marketing Plan (BMP)
- 2025 Incremental Funding Brand Marketing Plan

Proposal Content

Items 12-24 to be submitted separately as Excel/Word files to be titled individually as Offeror Name_(insert titles below):

- 2023 Brand Marketing Budget Plan Worksheet (Attachment 1)
- 2023 Performance Measures Worksheet (Attachment 2)
- 2023 Subcontractor References (Attachment 3)
- 2024 Brand Marketing Budget Plan Worksheet (Attachment 4)
- 2024 Incremental Funding Plan Budget Plan Worksheet (Attachment 5)
- 2024 Performance Measures Worksheet (Attachment 6)
- 2024 Incremental Funding Performance Measures Worksheet (Attachment 7)
- 2024 Subcontractor References (Attachment 8)
- 2025 Brand Marketing Budget Plan Worksheet (Attachment 9)
- 2025 Incremental Funding Plan Budget Plan Worksheet (Attachment 10)
- 2025 Performance Measures Worksheet (Attachment 11)
- 2025 Incremental Funding Performance Measures Worksheet (Attachment 12)
- 2025 Subcontractor References (Attachment 13)

Proposal Content

Items 25-34 to be individually labeled accordingly and submitted as one PDF file in the order listed below to be titled Offeror Name_Proposal Part 2:

- Offeror Check List (Attachment 14)
- Proposal Transmittal Letter (Attachment 15)
- Corporate Resolution (Attachment 16)
- Standard Qualifications Questionnaire (Attachment 17)
- Contractor References (Attachment 18)
- 2023 Partnership Opportunities (Attachment 19)
- 2024 Partnership Opportunities (Attachment 20)
- 2025 Partnership Opportunities (Attachment 21)
- Certificate of Vendor Compliance or Proof of Application for CVC
- Confidential Information List - if applicable (Attachment 22)

2023

July - December

- Brand Marketing Plan
- Performance Measures Worksheet
- Budget Plan Worksheet
- Subcontractor References
- Subcontractor References
- Partnership Opportunities

2024

January - December

- Brand Marketing Plan
- Performance Measures Worksheet
- Budget Plan Worksheet
- Incremental Funding Brand Marketing Plan
- Incremental Budget Plan Worksheet
- Incremental Performance Measures Worksheet
- Subcontractor References
- Partnership Opportunities

2025

January - December

- Brand Marketing Plan
- Performance Measures Worksheet
- Budget Plan Worksheet
- Incremental Funding Brand Marketing Plan
- Incremental Budget Plan Worksheet
- Incremental Performance Measures Worksheet
- Subcontractor References
- Partnership Opportunities

HTA's Key Performance Indicators

- Success of the Hawai'i Tourism Authority will be measured by the following Key Performance Indicators (KPIs):
 - Resident Sentiment
 - Visitor Satisfaction
 - Average Daily Visitor Spending
 - Total Visitor Expenditures

Canada MMA Key Performance Indicators

The Brand Management & Marketing Key Performance Indicators for the Canada Market are:

- By the end of CY25, Grow Average Daily Visitor Spending over 2019 by xx%. (Target to be proposed by Offeror)
- By the end of CY25, Grow Total Visitor Expenditures over 2019 by xx%. (Target to be proposed by Offeror)
- By the end of CY25, increase number of Multi-Island Visitors over 2019 by xx%. (Target to be proposed by Offeror)
- By the end of CY25, increase the Average Islands Visited (Per Person) over 2019 by xx%. (Target to be proposed by Offeror)
- Increase percentage for “visitors recall hearing or seeing information about safe and responsible travel prior to arrival” compared to the most recent study
- Increase percentage for "visitors recall hearing or seeing information about caring for and respecting Hawai'i's culture, people, and environment prior to arrival" compared to the most recent study
- Increase percentage for "visitors recall hearing or seeing information about ocean and hiking safety prior to arrival" compared to the most recent study
- Increase percentage for "visitors recall hearing or seeing information about volunteer/giving back opportunities prior to arrival" compared to the most recent study
- Increase percentage for "visitors recall hearing or seeing information about support local/shop local prior to arrival" compared to the most recent study
- Increase percentage of consideration for visiting Hawai'i within the next 12 months compared to the most recent study
- Increase percentage of visitors participating in voluntourism compared to the most recent study

Resources

Website References

Ma'ema'e Toolkit	https://bit.ly/2MrqonN
HTA Brand Assets/Knowledge Bank (photos, videos, b-rolls)	https://hawaii.barberstock.com/
HTA Strategic Plan	https://www.hawaii tourism authority.org/who-we-are/our-strategic-plan/
HTA Destination Management Action Plans (DMAPS) 2021-2023	https://www.hawaii tourism authority.org/what-we-do/hta-programs/community-based-tourism/
HTA Programs	https://www.hawaii tourism authority.org/what-we-do/
HTA RFP Website	http://www.hawaii tourism authority.org/RFPs

Points of Contact

Tracey Fermahin – Procurement Officer

Notice of Intent to Apply - Email: procurement@gohta.net

Questions or Concerns – Communicate via HlePRO

Offerors should only communicate with, and rely on information from, the Procurement Office of the HTA. The HTA is not responsible for misinformation provided by anyone outside the Procurement Office.

DEADLINE TO SUBMIT WRITTEN QUESTIONS

March 20, 2023
4:30 p.m. HST

DEADLINE FOR RECEIPT OF PROPOSALS

**April 21, 2023
2:00 p.m. HST**

Questions & Answers

Mahalo!