

MANDATORY BID FORM

Bidders **must** download The Mandatory Bid Form in its entirety (open, save, or print documents(s) on their own computer system), enter pricing where indicated, complete any other required information, sign all appropriate forms, and attach (upload) the completed Mandatory Bid Form to their HlePRO online bid submission.

BID CHECKLIST

THE FOLLOWING ITEM IN THIS TABLE MUST BE ADDRESSED AND THE COMPLETED BID CHECKLIST SHALL BE UPLOADED WITH THE BIDDERS HIEPRO SUBMISSION.

REQUIREMENT DESCRIPTION	ACTION REQUIRED	COMPLETE
Review Notice to Bidders	Read and understood	
Bid Requirements	Read and understood	
Technical Specifications	Read and understood	
Special Provisions	Read and understood	
Service Level Agreement (SLA)	Attach to HlePRO (If applicable)	
Software License Agreement	Attach to HlePRO (If applicable)	
Bid Checklist	Complete and attach to HlePRO	
Bid Price List	Complete, sign, and attach to HlePRO*	
Bid Signature Page	Complete, sign, and attach to HlePRO	
Business Classification Statement	Complete, sign, and attach to HlePRO	

* The University is not responsible for any errors in bid calculations or extensions not attributed to a system error.

BID PRICE LIST

Bidders must bid on all items in order to be considered for award.

Item	Service Type Per Contract Year	Frequency	Estimated Quantity		Unit Price		Bid Price Total (Estimated Quantity X Unit Price)	
1	Full Electronic Verification Services (estimated amount of 2,000 cases per 12-month period.)	Per Verification	2,000	X		=	\$	
2	Manual Verification Processing (estimated amount of 2,250 cases per 12-month period.)	Per Verification	2,250	X		=	\$	
4	Inbound Call Center Services	Per Call	1,800	X	\$	=	\$	
5	Electronic Signature system for all Financial Aid documents, including those unrelated to Verification completion during the contract year	Per Year	1	X	\$	=	\$	
6	Professional Judgement Appeal (estimated amount of 360 per 12-month period.)	Per Verification	360	X	\$	=	\$	
Total Aggregate Bid Price (Lines 1 + 2 + 3 + 4 + 5 + 6)								

- THE PROPOSED PRICES FOR ALL ITEMS SHALL INCLUDE ALL COST INCLUDING BUT NOT LIMITED TO, ANY ONE-TIME FEES, IMPLEMENTATION, TRAINING, ACCOUNT MANAGEMENT, SOFTWARE APPLICATION FEES, SERVICE, SUPPORT, LABOR, OVERHEAD, FEES (IF ANY) AND ALL APPLICABLE TAXES.
- THE TOTAL AGGERATE BID PRICE ABOVE SHALL BE ENTERED INTO HIEPRO

- **THE TOTAL AGGERATE BID PRICE ENTERED INTO HIEPRO MUST BE IDENTICLE TO THE NUMBER SHOWN ABOVE.**
- **AWARD WILL BE A NOT TO EXCEED REQUIREMENTS CONTRACT. THE CONTRACT VALUE BASED ON ESTIMATES ARE NOT A GUARANTEE PAYMENT OBLIGATION BY THE UNIVERSITY.**

REMITTANCE ADDRESS

In the event that the undersigned is awarded this contract and its remittance address differs from the address shown below on the BID SIGNATURE PAGE, please indicate remittance address below:

Street Address or P. O. Box

City State Zip Code

SIGNATURE PAGE

(IF BY INDIVIDUAL)

NAME (Signature)

TYPED NAME

D.B.A.

FEDERAL TAXPAYER
IDENTIFICATION NUMBER

ADDRESS

CITY

STATE

ZIP CODE

EMAIL ADDRESS

TELEPHONE NUMBER

FAX NUMBER

(IF BY PARTNERSHIP)

OFFICIAL/LEGAL NAME OF FIRM

FEDERAL TAXPAYER
IDENTIFICATION NUMBER

NAME (Signature)

TYPED NAME

PARTNER

EMAIL ADDRESS

ADDRESS

CITY

STATE

ZIP CODE

TELEPHONE NUMBER

FAX NUMBER

(IF BY CORPORATION)

OFFICIAL/LEGAL NAME OF COMPANY

FEDERAL TAXPAYER
IDENTIFICATION NUMBER

*OFFICER (Signature)

TYPED NAME

EMAIL ADDRESS

TITLE

ADDRESS OF COMPANY

CITY

STATE

ZIP CODE

TELEPHONE NUMBER

FAX NUMBER

(CORPORATE SEAL)

IF LICENSED OR INCORPORATED TO DO BUSINESS WITHIN THE STATE OF HAWAII AND SUBJECT TO THE PROVISIONS OF THE HAWAII GENERAL EXCISE TAX LAWS, INDICATE GENERAL EXCISE TAX LICENSE NUMBER

*For Corporations include evidence of the authority of this officer to submit a bid on behalf of the corporation, giving also, the address and names and addresses of the other officers. NOTE: FILL IN ALL BLANK SPACES WITH INFORMATION ASKED FOR OR BID MAY BE INVALIDATED.

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BUSINESS CLASSIFICATION CERTIFICATION STATEMENT

CONTRACTORS: Please complete the information below. Terms used are taken from the U.S. Small Business Administration (SBA) Rules and Regulations (<https://www.sba.gov/>) and the U.S. Code of Federal Regulations (CFR). The term "controlled" refers to the management and daily operation of the business concern.

The company identified below (check all that apply):

1. _____ **IS NOT** a small business concern as defined in the regulations
(If you checked here, STOP. GO TO CERTIFICATION BELOW.)
_____ **IS a small business concern**, defined as one that is independently owned and operated, is organized for profit, is not dominant in its field, meets the SBA size standard eligibility (see reverse side of this form for examples of size standards), is registered and has its status represented in the U.S. Government's System for Award Management (SAM) database. See <http://www.sba.gov/content/what-sbas-definition-small-business-concern>.
2. _____ IS a **small disadvantaged business concern** of which at least 51% is unconditionally and directly owned and controlled by one or more socially disadvantaged and economically disadvantaged persons who are U.S. citizens. See 13 CFR 124.105 for exceptions.
3. _____ IS a **women-owned small business concern** of which at least 51% is unconditionally and directly owned and controlled by one or more women who are U.S. citizens. See 13 CFR 127.
4. _____ IS a **HUBZone small business concern** that meets the certification eligibility requirements set by the U.S. SBA. See 13 CFR 126.
5. _____ IS a **veteran-owned small business concern** of which at least at least 51% is unconditionally and directly owned by one or more veterans or service-disabled veterans. See 38 CFR 74.
6. _____ IS a **service-disabled veteran-owned small business concern** of which at least 51% is unconditionally and directly owned by one or more service-disabled veterans. In the case of any publicly owned business, not less than 51% of the stock of which is owned by one or more service-disabled veterans. The management and daily business operations of which are controlled by one or more service-disabled veterans, or in the case of a veteran with a permanent and severe disability, a spouse or permanent caregiver of such veteran. See 13 CFR 125.11 et al.

CERTIFICATION

I hereby certify the information supplied herein to be true and correct. (Any misrepresentation shall be subject to the provisions stated in item B on the next page.)

Company Name: _____

Signature of Company Officer

Company Address: _____

Print Name: _____

Title: _____

Date: _____

Type of Goods/Services: _____

North American Industry Classification System (NAICS) Code: _____

MANDATORY BID FORM

A. A small business concern is one that is independently owned and operated, is organized for profit, is not dominant in its field, has a place of business in the U.S., and operates primarily within the U.S. or makes a significant contribution to the U.S. economy. Size standard eligibility is based on the average number of employees for the preceding 12 months or on sales volume averaged over a 3-year period. See 13 CFR 121.201 for size standards identified by NAICS codes. The size standards for a few industries are shown below and are subject to change at any time.

1. SPECIALTY TRADE CONTRACTORS – “Small” if average annual receipts for preceding 3 years do not exceed \$15 million.
2. CONSTRUCTION, GENERAL CONTRACTORS – “Small” if average annual receipts for preceding 3 years do not exceed \$36.5 million.
3. MANUFACTURING – “Small” if 500 employees or less, except for some specific products which will increase the complement of employees to 750 or 1,000.
4. TRANSPORTATION – “Small” if average annual receipts for preceding 3 years do not exceed the amount shown for specific services.

\$27.5 million – general freight trucking, local.

5. WHOLESALE TRADE, DURABLE AND NON-DURABLE GOODS – “Small” if 100 employees or less.
6. RETAIL TRADE – “Small” if average annual receipts for preceding 3 years do not exceed the amount shown for specific products.

\$7.5 million – hardware stores.

7. SERVICES – “Small” if average annual receipts for preceding 3 years do not exceed the amount shown for specific services:

- a) \$27.5 million – computer systems design services, custom computer programming services
\$20.5 million – security guards and patrol services
- b) \$18 million – janitorial services
- c) \$38.5 million – passenger car rental
- d) \$32.5 million – office machinery and equipment rental & leasing
- e) \$7.5 million – general automotive repair

Annual receipts of a concern which has been in business for less than 3 complete fiscal years means the total receipts for the period the concern has been in business divided by the number of weeks in business, multiplied by 52. See 13 CFR 121.104.

B. Notice. Under 15 U.S.C. 645(d), any person who misrepresents a firm’s status as a small business concern, a qualified HUBZone small business concern, a small business concern owned and controlled by socially and economically disadvantaged individuals, or a small business concern owned and controlled by women in order to obtain a contract to be awarded under the preference programs established pursuant to 15 U.S.C. sections 637(a), 637(d), 638, 644, or 657(a), shall:

1. Be punished by imposition of fine, imprisonment, or both;
2. Be subject to administrative remedies including suspension and debarment; and
3. Be ineligible for participation in a program conducted under the authority of the Small Business Investment Act of 1958.