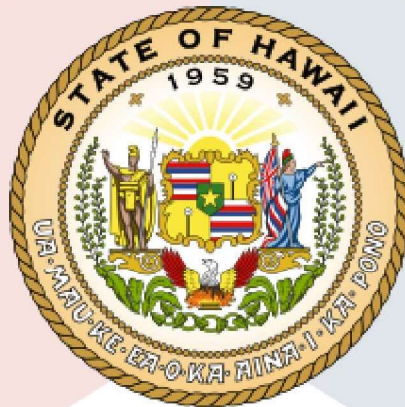


REQUEST FOR PROPOSALS  
for  
**PROCUREMENT ASSISTANCE  
AND SUPPORT SERVICES**

Issued by  
the STATE OF HAWAII



In collaboration with



**SOLICITATION NUMBER 24001**

RFP WEBSITE: <https://hiepro.ehawaii.gov/welcome.html>

BY SUBMISSION TO THE HAWAII STATE EPROCUREMENT SYSTEM  
(HlePRO)

*Cheryl Ann Roberts*

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Procurement Officer



## **ATTACHMENT 00**

### **RFP OVERVIEW**

#### **I. INTRODUCTION**

This Request for Proposals (RFP) is being issued by the State of Hawaii (“Lead State”) in collaboration with the NASPO ValuePoint cooperative purchasing program. The purpose of this RFP is to establish one or more Master Agreements for Procurement Assistance and Support Services (PASS).

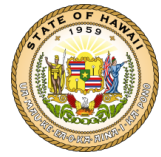
Participation in NASPO ValuePoint Master Agreements is convenient and cost-effective for eligible entities—including state departments, institutions, agencies, and political subdivisions, federally recognized tribes, and other eligible public and nonprofit entities in the 50 states, the District of Columbia, and U.S. territories—and suppliers, with no membership or registration required. In 2022, contractors reported a combined **\$19 billion** in sales through NASPO ValuePoint Master Agreements awarded through cooperative solicitations like this RFP, including a combined **\$18.3 Million** in sales through the current Procurement of Acquisition Support Services (PASS) portfolio.

More information about NASPO, NASPO ValuePoint, and the NASPO ValuePoint Lead State Model can be found at [www.naspo.org](http://www.naspo.org) and [www.naspovaluepoint.org](http://www.naspovaluepoint.org) and in Attachment 05, Participation Information.

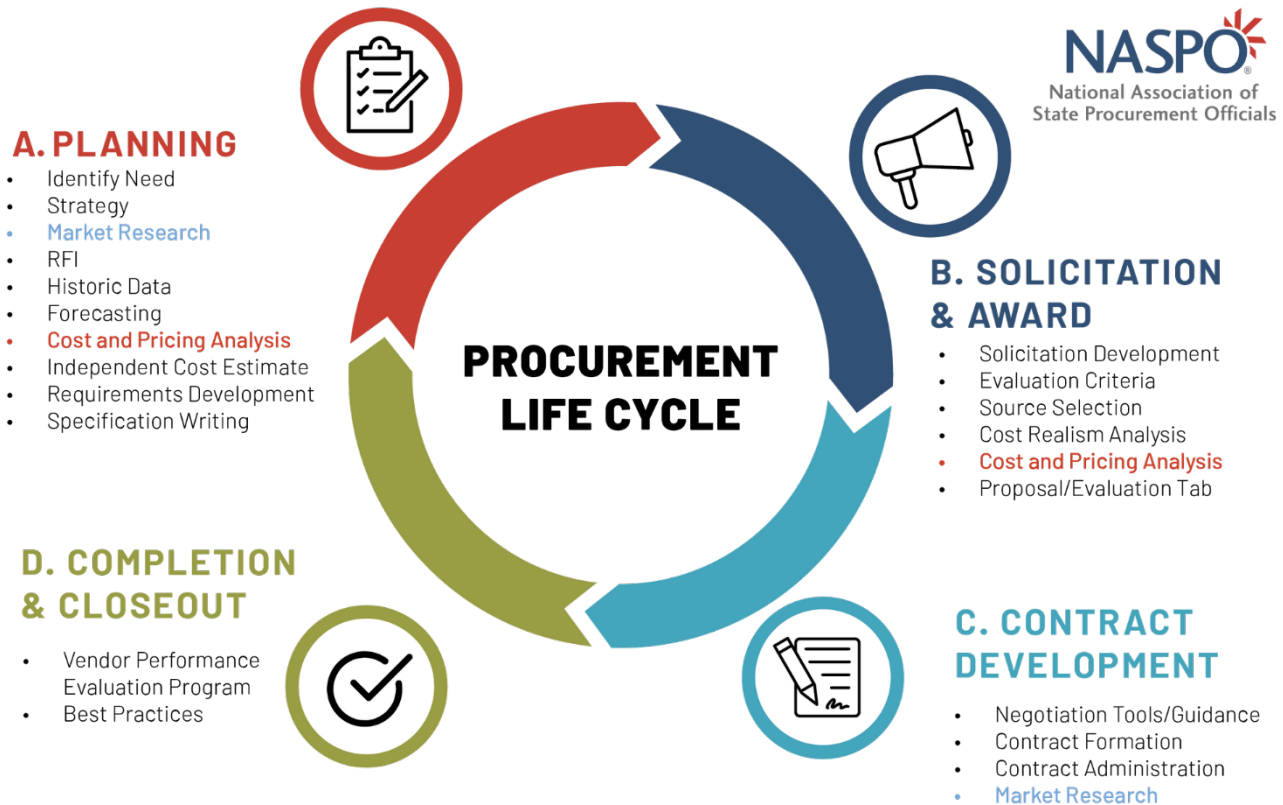
**NASPO ValuePoint** is a division of the National Association of State Procurement Officials (NASPO), a non-profit association dedicated to advancing public procurement through leadership, excellence, and integrity. In accordance with NASPO ValuePoint’s Lead State Model™, the Lead State is issuing this RFP, evaluating responses, and establishing Master Agreements with the support and assistance of a Multistate Sourcing Team™ composed of individuals from other member states, representing a broad range of perspectives that ensure the RFP incorporates best practices recognized by public entities across the country.

**Background.** There is a need for procurement assistance and support services in State government. Seasoned procurement personnel are retiring and not replaced quick enough to fill the gap. The intent of this procurement is to contract Procurement Subject Matter Experts to supplement current lack of knowledge and expertise in multiple areas of the procurement lifecycle and not intended to be utilized to provide staff augmentation services.

Services include procurement planning assistance, including market research and procurement strategy recommendation; procurement document development including cost/price estimates, quality assurance surveillance plans, statements for work, synopses, solicitations, price negotiation memoranda, etc.; expert assistance in supporting proposal evaluations, including price/cost analysis or technical proposal analysis; contract administration support services, including assistance reviewing contractor performance, development of contract modifications, and investigating reports of contract discrepancies; contract close-out assistance; competitive sourcing support, including strategic sourcing studies; privatization studies, public-private partnerships.



Services may be required in any phase within the procurement life cycle phases shown below.



It is important to recognize, however, that the government/state/city organization has fundamental inherent government functions that should not be delegated to a Contractor. When it relates to procurement, government personnel should be making final decisions. Federal Procurement Law defines inherent functions as those to be performed only by government employees. The State of Hawaii, State Procurement Office (SPO) recommends this guidance as a good procurement policy and considers the following responsibilities as inherently governmental functions:

- Determining what supplies or services are to be acquired by the Government;
- Approving any solicitation documents, to include documents defining requirements, specifications, incentives, and evaluation criteria;
- Negotiating;
- Awarding contracts;
- Approving post-award contract changes to include, but not limited to, ordering changes in contract scope, schedule, budget;
- Responding to evaluations of Contractor performance and accepting or rejecting Contractor products or services; and
- Terminating contracts.

It is the responsibility of the Procurement Officer placing the order to make the determination if an action must be performed by the government or may be performed by a Contractor. Ordering



activities must require prospective Contractors to identify potential conflicts of interest and address those, prior to task order award. For more information, see Attachment 02 Scope of Work.

The objective of this RFP is to obtain best value and achieve more favorable pricing by leveraging economies of scale than is obtainable by an individual state or local government entity. The Master Agreement(s) resulting from this procurement may be used by state governments (including departments, agencies, institutions), institutions of higher education, political subdivisions (i.e., colleges, school districts, counties, cities, etc.), the District of Columbia, territories of the United States, and other eligible entities subject to approval of the individual state procurement director and compliance with local statutory and regulatory provisions. The initial term of the master agreement shall be two (2) years with four (4) additional 12-month periods.

It is anticipated that this RFP may result in Master Agreement awards to multiple Contractors at the Lead State's discretion.

The purpose of this solicitation is to select Contractor(s) who can offer all services for all members participating in the NASPO ValuePoint Cooperative Purchasing Program. Full coverage across the nation is our primary goal. Only proposals submitted for nationwide coverage will be considered.

## II. SCOPE OF WORK

A detailed description of the Deliverables being sought through this RFP is attached as Attachment 02, Scope of Work.

The scope of this RFP and its resulting Master Agreement(s) is intended to benefit all state departments, institutions, agencies, and political subdivisions and other eligible public and nonprofit entities in the 50 states, the District of Columbia, and U.S. territories. Therefore, **Offerors should not interpret the Scope of Work to be associated with or limited to any specific purchase, implementation, project, need, or program** within the Lead State or any other state or eligible entity. Proposals should be generally applicable to all potential Participating Entities and Purchasing Entities, except where specificity is requested.

## III. GENERAL INFORMATION AND INSTRUCTIONS

- A. **RFP Contact.** The following individual is the sole contact for this RFP:  
Donna (Donn) Tsuruda-Kashiwabara, C.P.M.  
Purchasing Supervisor  
State of Hawaii, State Procurement Office  
1151 Punchbowl Street, Room 416  
Honolulu, HI 98613  
[donna.tsuruda-kashiwabara@hawaii.gov](mailto:donna.tsuruda-kashiwabara@hawaii.gov)  
phone: (808) 586-0565; fax: (808) 586-0570



## **B. Electronic Procurement**

1. The State has established the Hawaii State eProcurement (HlePRO) System to promote an open and transparent system for vendors to compete for state contracts electronically. Offerors interested in responding to this solicitation must be registered on HlePRO. Registration information is available at the State Procurement Office (SPO) website: <http://spo.hawaii.gov/HlePRO>, then select HlePRO Vendor Registration Guide.
2. The State will use HlePRO to issue the RFP, receive Offers, and issue Addenda to the RFP, including additions or changes with respect to the dates in Section D. Important Dates. The State is not responsible for any delay or failure of any Offeror to receive any materials updated through the RFP Process on a timely basis.
3. 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 per Contractor for the initial contract term, which is two years. The mandatory fee (.75%) is applicable for sales to Hawaii government agencies **only**, calculated on a quarterly basis for the initial term, which is two years. This transaction fee shall be based on the total sales made against this contract, for sales to Hawaii government agencies only, payable to Tyler Hawaii, the vendor administering HlePRO. Refer to Exhibit 1, Hawaii Participating Addendum, 4. Participating State Modifications or Additions to the Master Agreement, Changes: B. Payment to Hawaii Information Consortium, LLC dba Tyler Hawaii.
4. HlePRO Special Instructions. Offeror shall review all special instructions located in HlePRO. Offerors are responsible for ensuring that all necessary files are attached to their offer prior to the proposal deadline.

Offerors are advised that they should not wait until the last minute to submit their proposal on HlePRO. Offerors should allow ample time to review their submitted proposal, including attachments, prior to the proposal deadline.

**Offerors shall enter \$0.00 as the Unit Price in US Dollars and Cents when submitting their offer in HlePRO.**

5. For assistance with technical issues associate with the eProcurement system, contact Tyler Hawaii at (808) 695-4620.

## **C. RFP Documents**. This RFP consists of this RFP Overview, the following attachments and Exhibits, and any information or materials posted by the Lead State to the RFP Website, as amended:

1. Attachment 01, RFP Terms and Conditions
2. Attachment 01-A, Hawaii General Provisions
3. Attachment 02, Scope of Work
4. Attachment 03, RFP Evaluation Plan
5. Attachment 04, Sample Master Agreement
6. Attachment 05, Participation Information



7. Attachment 06, Protest Information
8. Attachment 07, Offeror Information, Acknowledgements, and Certifications
9. Attachment 08, Offeror Response Worksheet
10. Attachment 08-A-1, Task Order Request Form – Scenario 1
11. Attachment 08-A-2, Task Order Request Form – Scenario 2
12. Attachment 09, Labor Categories Price Worksheet
13. Attachment 10, Claim of Business Confidentiality
14. Exhibit 1, Sample Hawaii Documents - Participating Addendum (PA); Attorney General Conditions; Uniform Request for Quotes; Form SPO-012, Evaluation: Vendor or Product; FEMA Terms and Conditions
15. Exhibit 2, Montana's Ts & Cs
16. Exhibit 3, Idaho's Ts & Cs
17. Exhibit 4, Illinois' Ts & Cs

This RFP is designed to provide interested Offerors with sufficient information to submit proposals meeting minimum requirements, but it is not intended to limit a proposal's content or exclude any relevant or essential data.

**D. Important Dates.** All times are Hawaii Standard Time (HST). If a component of this schedule, such as "RFP Close Date" is delayed, the rest of the schedule may likely be shifted by the same number of days. Any change to the RFP Schedule and Significant Dates prior to the proposal due date shall be issued by addendum.

1. **RFP Release Date:** November 3, 2023
2. **RFP Pre-proposal Conference:** November 13; 10:30 a.m. HST
3. **RFP Question Deadline:** November 20, 2023; 2:30 p.m. HST
4. **RFP Answer Deadline:** December 6, 2023; 2:30 p.m. HST
5. **RFP Close Date:** December 20, 2023; 2:30 p.m. HST

**E. RFP Pre-proposal Conference:** Attendance at the RFP Pre-proposal Conference is optional. To join the TEAMS webinar, click on the link to register and you will receive a confirmation email. Here is the link to register:  
<https://events.gcc.teams.microsoft.com/event/92f8d8ba-98a0-4f0f-89f4-1544cca0d58a@3847dec6-63b2-43f9-a6d0-58a40aaa1a10>.

If you need an auxiliary aid/service or other accommodation due to a disability, contact [state.procurement.office@hawaii.gov](mailto:state.procurement.office@hawaii.gov) as soon as possible, preferably by November 7, 2023. If a response is received after November 7, we will try to obtain the auxiliary aid/service or accommodation.

Upon request, this notice is available in alternate/accessible formats.

During the conference Vendors shall have the opportunity to ask questions and the State will make a reasonable attempt to answer all questions. Oral answers will not be binding. Vendors must follow the instructions provided in Section F. How to Ask Questions to submit questions and receive formal, binding answers to any questions related to this RFP.

Dates and deadlines are subject to change. Offerors should continue checking the RFP Website for the most up-to-date information. A summary of the pre-proposal conference



will be provided via an addendum posted in Hawaii State eProcurement System (HlePRO).

**F. How to Ask Questions.**

1. Read and review this RFP, including all attachments, exhibits, and amendments.
2. All questions must be submitted through Hawaii State eProcurement System (HlePRO). Questions must be submitted by the question deadline date and time shown in Section III GENERAL INFORMATION AND INSTRUCTIONS, D. Important Dates. Answers will be given via the Hawaii State eProcurement System (HlePRO) site as noted in Section III GENERAL INFORMATION AND INSTRUCTIONS, D. Important Dates.
3. Offerors are cautioned about including context in questions that may reveal the source of questions. The identity of potential Offerors will not be published with the answers, but the text of questions will be restated, to the extent possible, to exclude information identifying potential Offerors.
4. The Lead State may refuse to answer any questions received after the Question/Answer deadline.
5. Questions must reference the specific section of the RFP to which the question relates.

**G. Questions Regarding RFP Contents.** If a Prospective Offeror believes that any provision of the RFP is unclear, potentially defective or would prevent it from providing a meaningful Offer, it shall submit questions to the State POC requesting clarification on or before the deadline for doing so in Section III GENERAL INFORMATION AND INSTRUCTIONS, D. Important Dates. Each question shall identify the attachment number, page, section number, paragraph, and line or sentence of such provision(s) of the RFP to which the question applies. The State Point of Contact (POC) will respond by the date for the same in Section Important Dates. The State may issue Addenda in response to written questions received regarding the RFP.

**H. Proposal Structure and Labeling**

Proposals must be detailed and concise. Each Proposal must be labeled and organized in a manner that is congruent with the requirements and terminology used in this RFP and must include a point-by-point response, structured in form and reference to the RFP, addressing all requirements and the Scope of Work elements.

- I. Proposal Objectives.** One of the objectives of this RFP is to make proposal preparation easy and efficient, while giving Offerors ample opportunity to highlight their proposals. The evaluation process must also be manageable and effective.

Proposals shall be prepared in a straightforward and concise manner, in a format that is reasonably considered and appropriate for the purpose. Emphasis will be on completeness and clarity and content.

When an Offeror submits a proposal, it shall be considered a complete plan for accomplishing the tasks described in this RFP and any supplemental tasks the Offeror has identified as necessary to successfully complete the obligations outlined in this RFP.



The proposal shall describe in detail the Offeror's ability and availability of services to meet the goals and objectives of this RFP.

#### **J. Proposal Submission Instructions**

Proposals must be received by 2:30 p.m. on December 20, 2023, through the Hawaii Electronic Procurement System (HlePRO). Hard copies will not be accepted. Electronically submitted offer shall be considered the original. Any offers received outside of the HlePRO, including faxed or e-mailed bids, shall not be accepted or considered for award. Any offer received after the due date and time shall be rejected.

Submission of a proposal shall constitute an incontrovertible representation by the Offeror that the Offeror agrees to comply with every requirement of this RFP, and that the RFP documents are sufficient in scope and detail to indicate and convey reasonable understanding of all terms and conditions of performance of the work.

#### **K. Required Format and Content**

All Proposals must be submitted in the following format. Detailed information on submitting each of these sections is contained in later sections of this RFP. Proposal shall be submitted in size 12 Arial font or equivalent, excluding charts, tables and graphs.

**The maximum file size that HlePRO can accept is 100MB. Files larger than 100MB must be reduced into two or more files.** Offeror can choose to 'zip' files and attach in HlePRO. However, zip files must not exceed 100MB.

### **IV. OFFEROR RESPONSE**

#### **A. How to Respond.**

1. Read and review this RFP, including all attachments, exhibits, and amendments.
2. Prepare a proposal that:
  - a. Follows the requested format;
  - b. Includes the Solicitation Number on all materials making up the proposal;
  - c. Addresses each question and request for a response in this RFP, including all questions in Attachment 08, Offeror Response Worksheet;
  - d. Clearly demonstrates your ability to meet the Scope of Work described in Attachment 02; and
  - e. Includes all required submissions identified in Section IV OFFEROR RESPONSE, B. Required Submissions.
3. Submit your proposal by the RFP Close Date via HlePRO. See Section III General Information and Instructions, B. Electronic Procurement.

#### **B. Required Submissions.** The following must be submitted with your proposal:

1. Any response required to be submitted directly through the RFP Website;
2. Completed and signed Attachment 07, Offeror Information, Acknowledgements, and Certifications
3. Completed Attachment 08, Offeror Response Worksheet
4. Completed Attachments 08-A-1 and 08-A-2 Task Order Request Forms





5. Completed Attachment 09, Labor Categories Price Worksheet, submitted as a separate document and separate file
6. Completed and signed Attachment 10, Claim of Business Confidentiality
7. Redacted copy of proposal clearly marked as such, if claiming confidential, proprietary, or protected information

**C. Other Documents.** The following are informational only and do **not** need to be submitted with your proposal:

1. This RFP Overview
2. Attachment 01, RFP Terms and Conditions
3. Attachment 01-A Hawaii General Provisions
4. Attachment 02, Scope of Work
5. Attachment 03, RFP Evaluation Plan
6. Attachment 04, Sample Master Agreement
7. Attachment 05, Participation Information
8. Attachment 06, Protest Information
9. Exhibit 1, Hawaii Sample Documents
10. Exhibit 2, Montana's Ts & Cs
11. Exhibit 3, Idaho's Ts & Cs
12. Exhibit 4, Illinois' Ts & Cs

## **V. EVALUATION AND AWARD PROCESS**

- A. Proposals will be sealed until the RFP Close Date. After opening, proposals will be evaluated in stages as set forth in this section and further detailed in Attachment 03, RFP Evaluation Plan.
- B. Prior to announcement of awards and execution of Master Agreements, the Lead State will present an award recommendation to NASPO ValuePoint for approval of the proposed awards.
- C. Following approval of NASPO ValuePoint and after a final selection(s) are made, the Lead State will issue a notice of award on its electronic procurement system (HiePRO). Upon award, proposal files are public records and available for review at the offices of the Lead State by submitting Request for Access to Government Record. Information on the Office of Information Practices and forms may be found at: <http://oip.hawaii.gov>.
- D. **Debriefing.** Pursuant to HAR §3-122-60, a non-selected Offeror may request a debriefing to understand the source selection decision and contract award.

A written request for debriefing shall be made within three (3) working days after the posting of the award of the contract. The Procurement Officer or designee shall hold the debriefing within seven (7) working days to the extent practicable from the receipt date of written request.

A protest by the requestor following a debriefing, shall be filed within five (5) working days, as specified in HAR §103D-303(h). See Attachment 06 Protest Information for submitting a protest.



#### **E. Overview of State of Hawaii Procurement Process**

1. The RFP is issued pursuant to Subchapter 6 of HAR chapter 3-122, implementing HRS §103D-303 on competitive sealed proposals.
2. The RFP will be issued through HlePRO. Written questions regarding the RFP are submitted through HlePRO. Responses to questions are issued by Addendum through HlePRO. Changes to the RFP are issued by Addendum through HlePRO.
3. Proposals shall be received through HlePRO. Offeror's proposal shall be open to the public after posting of award, except for portions of the proposal that the Offeror has labeled confidential and/or proprietary pursuant to HAR §3-122-58.
4. An evaluation committee approved by the Procurement Officer, shall evaluate the proposals in accordance with Attachment 03 RFP EVALUATION PLAN, Section VI EVALUATION CRITERIA.
5. Proposals may be accepted on evaluation without discussion. If deemed necessary, prior to entering into discussions, a "priority list" of responsible Offerors submitting acceptable and potentially acceptable proposals shall be generated. The priority list may be limited to a minimum of three (3) responsible Offerors who submitted the highest-ranked proposals. The objective of these discussions is to clarify issues regarding the Offeror's proposal before the Best and Final Offer (BAFO) is tendered.
6. If the State determines a BAFO is necessary, it shall request one from the Priority-Listed Offeror(s). The Offeror shall submit its BAFO through HlePRO.
7. If during discussions there is a need for any substantial clarification or change in the RFP, the RFP shall be amended by an addendum to incorporate such clarification or change. Addenda to the RFP shall be distributed only to priority-listed offerors.
8. The date and time for Offerors to submit their BAFO, if any, is indicated in Section D. Important Dates. If Offeror does not submit a notice of withdrawal or a BAFO, the Offeror's immediate previous bid shall be construed as its BAFO.
9. After receipt and evaluation of the BAFOs in accordance with Attachment 03 RFP Evaluation Plan, the evaluation committee may have additional discussions after receiving approval by the Chief Procurement Officer (CPO) to conduct a second BAFO. Award(s), if any shall be made to the Offeror(s) whose proposal is determined to be the most advantageous to the State taking into consideration price and the evaluation factors set forth in the RFP.
10. The contents of any proposal shall not be disclosed during the review, evaluation, or discussion process. Once the notice of award(s) is made, all proposals, successful and unsuccessful, become available for public inspection. Those sections that the Offeror and the State agree are confidential and/or proprietary should be identified by the Offerors and shall be excluded from public access.
11. If a person is denied access to a State procurement record, the person may appeal the denial to the office of information practices in accordance with HRS §92F-42(12).