

**APPENDIX A
PROPOSAL LETTER
UNIVERSITY OF HAWAII**

We propose to provide marketing and advertising services named in the Request for Proposals (RFP) No. 24-7695 to Provide Marketing and Advertising Services for University of Hawaii Kapi`olanit Community College, Honolulu, Hawaii.

It is understood that this proposal constitutes an offer.

It is understood and agreed that we have read the University of Hawaii's specifications described in the RFP and that this proposal is made in accordance with the provisions of such specifications. By signing this proposal, we guarantee and certify that all items included in this proposal meet or exceed any and all such specifications.

We agree, if awarded the contract, to deliver goods or services which meet or exceed the specifications.

Respectfully submitted,

Legal Name of Offeror

Date

Authorized Signature (original) **(Typed Name)**

Title

Street Address

Telephone No.

City, State, Zip Code

Fax No.

Social Security OR Federal Tax Payer ID No.

Email

Remittance Address (if different from street address)

Hawaii General Excise Tax License No.

City, State, Zip Code

Location of Offeror's Plant

Offeror is: Individual Partnership Corporation* Joint Venture

State of Incorporation: Hawaii Other:

Is Corporate Seal Available In Hawaii: Yes** No

* Attach to this page evidence of authority of the above officer to submit an offer on behalf of the corporation, giving also, the names and addresses of the other officers.

** If yes, affix corporate seal

APPENDIX B 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: _____

APPENDIX B

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.

**APPENDIX C
UNIVERSITY OF HAWAII
OFFEROR PROFILE**

Company Name	
Type of Company	
Address	
Total # of Full Time Employees	
Phone Number	
Email	
Federal ID #	
State G.E.T #	
Company Start Date	
Project Manager/Principal Contact (Attach bio)	
Assigned Employees (Attach Bio)	
Assigned Employees (Attach Bio)	
Assigned Employees (Attach Bio)	
Assigned Employees (Attach Bio)	
Assigned Employees (Attach Bio)	
Assigned Employees (Attach Bio)	

Signature _____

Position/Title _____

Date _____

**APPENDIX D
EXECUTIVE SUMMARY**

Provide an Executive Summary that includes a brief overview of Offeror's proposal summarizing the anticipated results, as well as an overview of the key elements that the Offeror intends to follow to achieve these results.

APPENDIX E TECHNICAL PROPOSAL

Provide information regarding Offeror's approach including strategies for meeting project objectives and the rationale for the agency's approach in response to Section 2 – Scope of Work.

1. Build positive brand awareness about the College for both internal and external audiences.
2. Image enhancement and new branding are anticipated to increase student enrollment.
3. Build messaging for key target audiences.
4. Maximize community outreach and general leads for prospective students interested in the College's programs.
5. Strengthen and cultivate partnerships with businesses, high schools, and community organizations to boost referrals and engagement.
6. Remain competitive in the marketing efforts of competing institutions and maintain or gain a competitive edge.
7. Leverage digital platforms to promote the College and its programs locally and globally.

**APPENDIX F
SCHEDULE / TIMELINE**

Provide Offeror's project timeline within a SIX (6) month period including major milestones to achieve project objectives described in Section 2 – Scope of Work.

**APPENDIX G
QUALIFICATIONS AND EXPERTISE**

The OFFEROR shall describe the firm’s qualifications, and experience.

THE OFFEROR shall provide examples and evidence of the following that has been executed within the past THREE (3) years.

- 1. Cohesive branding and look/feel/tone for company, organization, or institution.
- 2. On-brand design and development of collateral marketing materials.
- 3. On-brand video production and photography.
- 4. Expertise and relevant success in digital marketing campaigns, data tracking, analytics, and reporting.

In addition, the OFFEROR shall identify the team it will use to provide goods/services. Professional background summaries of the key team members shall be included in the proposal

Clear and concise presentation of OFFEROR’s experience, expertise, capacity, and qualified personnel to successfully meet the needs of the Scope of Work as described in the RFP. Provide at least three detailed examples that demonstrate evidence of effective marketing to mid/late adolescents (18-20), young adults (21-26), and/or mid-career populations (30-45) in Hawai’i.
Examples and proof of completed work, including examples of brand development, on-brand marketing collateral, and on-brand video production.
Clear demonstration, with examples, of relevant success in digital advertising, data tracking, analytics, and reporting
Quality of OFFEROR’s references.
Clear demonstration, with examples, of working in and understanding of the diverse target audiences of the College in developing marketing and brand awareness.

APPENDIX H PRICE PROPOSAL

1. Include all labor, services, travel, materials, overhead, applicable taxes, and any other incidental and operational expenses.
2. Provide detail for each major category of expenses in a spreadsheet format.
3. Number of hours, rate type, and hourly rate for each category must be included.

NOTE: No other charges or reimbursement expenses will be allowed.

**APPENDIX I
REFERENCES**

Provide the information for THREE (3) references. Refer to Section 3.9 for further information.

Reference 1

Name of Institution: _____

Address: _____

Contact Name: _____ Position: _____

Telephone Number: _____ Email address: _____

Description of Services Provided:

Reference 2

Name of Institution: _____

Address: _____

Contact Name: _____ Position: _____

Telephone Number: _____ Email address: _____

Description of Services Provided:

Reference 3

Name of Institution: _____

Address: _____

Contact Name: _____ Position: _____

Telephone Number: _____ Email address: _____

Description of Services Provided: