

PROPOSAL APPENDIX FORMS

This document indicates the proposal requirements for the RFP which shall be submitted by the deadline set for submission of proposals. Offeror shall complete the appropriate proposal requirements, sign all appropriate forms, and attach (upload) the completed Appendixes to their HlePRO online RFP submission.

APPENDIX CHECKLIST

THE FOLLOWING APPENDIXES IN THIS TABLE MUST BE COMPLETED AS PART OF THE RFP AND SHALL BE UPLOADED WITH THE OFFERORS HlePRO SUBMISSION.

APPENDIX DESCRIPTION	APPENDIX
Proposal Letter	Appendix A
Business Classification Certification Statement	Appendix B
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The University is not responsible for any issues with the uploading of the Appendixes into HlePRO

APPENDIX A
PROPOSAL LETTER
UNIVERSITY OF HAWAII

We propose to provide the culinary management services named in the Request for Proposals (RFP) No. 24-1759 to Provide Building Research Competitiveness Across the University of Hawaii System, University of Hawaii, 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/Company

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
EXECUTIVE SUMMARY**

Offeror shall provide a succinct (less than two pages) overview of the Offeror's assessment of the work to be performed. The section should outline the key elements of the proposal and demonstrate a clear understanding of the concepts presented and desired overall performance expectations presented in this RFP.

**APPENDIX D
PROJECT NARRATIVE**

- A. Offeror shall describe the firm's qualifications, experience and size. In addition, the Offeror shall identify the team it will use to provide the goods/services.
- B. Provide the following information about the offeror:
1. Name and address of Offeror. Name of official who will coordinate all activities related to this project including telephone, fax and electronic mail address. Please also include local office(s) or proposed location of office(s).
 2. Biographical summaries of the lead business contact and other key team members shall be included in the proposal (to be included with Appendix D, described below). For members not yet identified, describe the process used to identify them.

This section should constitute the majority of the proposal and shall contain at least the following information:

- A complete narrative of the vendor's assessment of the work to be performed, the vendor's ability and approach, and the resources necessary to fulfill the requirements. The narrative should demonstrate the vendor's understanding of the desired overall performance expectations.
- A specific point-by-point response, in the order listed, to each required Offeror minimum qualification in Section 2.2 (Minimum Qualifications) in the RFP. The response should identify each requirement being addressed as enumerated in the RFP.
- A statement, if any, addressing each of the three (3) Desirable Qualifications found in Section 2.3.
- A description and explanation of alternatives or options.

APPENDIX E FEE STRUCTURE

The Offeror shall provide an anticipated cost analysis based on the statement of work in Section 2 (Scope of Work). This cost analysis should include anticipated number of hours, rate types and hourly rates for each person in spreadsheet form. Figures should also include anticipated consulting fees to multi-disciplinary and subject area experts as well as any contingency cost estimates and possible expenses not covered elsewhere. The final contract price will be based on a monthly retainer plus an annual fixed travel budget. Payment for travel will be for only actual allowable costs.

APPENDIX F PROJECT SCHEDULE

Performance of this contract will be driven by the proposal needs of the UH faculty. Month-to-month effort may vary significantly due to variability in funding cycles and proposal due dates. Site visits will be scheduled at mutually agreeable times. The annual report will be due no less than 60 days prior to the anniversary of the start date of this contract as stated in the Notice to Proceed letter.

**APPENDIX G
REFERENCES/RECOMMENDATIONS**

Offerors shall provide a minimum of at least FIVE (5) references, preferably within the last five years, who can attest to the reliability of the Offeror's service and personnel in the analysis of building research competitiveness across a university system. Furnish the names of companies, addresses, numbers, and contact persons. The University reserves the right to contact the references for additional information. Examples of reports of comparable work are also requested.