

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 Appendices to their HlePRO online RFP submission.

APPENDIX CHECKLIST

THE FOLLOWING APPENDICES 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
Price Quotation Sheet	Appendix C
Company History and Organization	Appendix D
Project Narrative	Appendix E
Offeror Qualifications	Appendix F
References	Appendix G

The University is not responsible for any issues with the uploading of the Appendices into HlePRO.

**APPENDIX A
PROPOSAL LETTER
UNIVERSITY OF HAWAII**

We propose to provide the video production services named in the Request for Proposals (RFP) No. 27-5832, Provide Video Production Services for University of Hawai'i System, Honolulu, Hawaii.

It is understood that this proposal constitutes an offer.

It is understood and agreed that we have read the University of Hawai'i'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

Page |3

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

Page |4

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
PRICE QUOTATION SHEET**

Name of Firm _____

Name of Authorized Representative _____

Title of Authorized Representative _____

Signature of Authorized Representative _____

Date _____

Total cost _____

Total cost shall be the fee to provide video production services, inclusive of all hardware, software, man-hours, materials, resources, travel-related expenses, overhead, and all applicable fees and taxes.

**APPENDIX D
COMPANY HISTORY AND ORGANIZATION**

Provide information regarding the Offeror's company history and organization in the following areas:

- A. Provide a description of the Offeror's operation.
- B. Provide a list of the Offeror's key personnel, description of their roles on the University's project and a brief description of their qualifications and experience working with higher education institutions.

APPENDIX E PROJECT NARRATIVE

Provide details on how the Offeror meets the creative development requirements and video series requirements of the University as referred to in Section 2.4, Scope of Work as follows:

- A. Provide a detailed plan that describes the approach to the project, outlines the overall strategy, and specific messaging ideas and campaign objectives for each video series.
- B. Provide a work plan which includes a project management plan, rate structure, budget tracking and expenditure reporting, plan to communicate with the University project team (e.g., status reports, meetings to discuss progress), and a timeline for the production of each video series detailing the cost of each milestone deliverable for creative development, filming, editing, revisions, and final delivery of each video series. The aggregate cost of the milestone deliverables shall be the same as the total cost entered in the Price Quotation Sheet (Appendix C). The work plan shall also identify key University responsibilities for the project.
- C. Describe how Offeror will work with the University to develop key messaging themes to be used in each video series.
- D. Describe how Offeror will regularly update the University System marketing team on the progress of the video production and address any concerns or changes, and describe how Offeror will ensure that senior leadership or project managers are available to meet with the University team through phone calls, emails, online meetings, or in-person meetings, at no cost to the University.

APPENDIX F OFFEROR QUALIFICATIONS

Provide details on how the Offeror meets the qualifications in Section 2.5, Qualifications of Offeror as follows:

- A. Provide portfolio of work with the quantity, descriptions and dates of a variety of comparable projects completed as evidence that the Offeror has at least TEN (10) years of extensive experience working with higher education institutions developing recruitment, marketing and brand awareness campaigns.
- B. Provide description, including client name, reference contact person and telephone number, of THREE (3) case studies or video production projects of similar scope and purpose as the UNIVERSITY's project (at least ONE [1] case study or video production project must be directly related to a higher education institution) that the Offeror has executed within the last THREE (3) years with the following:
 - 1) Creative visual storytelling and brand awareness for educational institutions.
 - 2) Full video production pipeline—including scriptwriting, on-location filming, and post-production editing, delivering high-quality video assets rooted in visual storytelling.
 - 3) Modern approach to enrollment marketing where content formatting and visual storytelling are creative and ties directly to institutional outcomes (increasing enrollment, transfer success, graduation rates, student recruitment, adult learner engagement, workforce development, institutional reputation), ensuring visual assets operate as part of a cohesive strategy.
 - 4) Optimized to engage specific target populations in Hawai'i, across all of the following audiences:
 - a. High school seniors and recent graduates (ages 17 to 18), traditional college age students (ages 18 to 24) via short-form, vertical, or social-first video frameworks.
 - b. Adult learners and career changers (ages 25 to 54), and working professionals seeking degree completion or career advancement via career-focused, flexible, or lifestyle-integrated video narratives.
- C. Identify any senior staff members who will be working on the University's project and their experience coordinating communications or marketing in higher education.

**APPENDIX G
REFERENCES**

Provide references of THREE (3) educational institutions or programs for whom similar services have been provided. The name of the educational institutions or programs, addresses, and name, title, phone number, and email address of at least ONE (1) contact person currently employed at the institution or program shall be furnished. Offeror is highly encouraged to select references of similar size, complexity, and demographic scope to the University of Hawai‘i. The University reserves the right to contact the references for additional information.

Institution or Program Name:	
Address:	
Contact Person (Name and Title):	
Phone number and Email address:	

Institution or Program Name:	
Address:	
Contact Person (Name and Title):	
Phone number and Email address:	

Institution or Program Name:	
Address:	
Contact Person (Name and Title):	
Phone number and Email address:	