



State of Hawai‘i

REQUEST FOR PROPOSALS
RFP NO. SI 2027-006

**MONDAY.COM CONSULTING, IMPLEMENTATION,
OPTIMIZATION & TRAINING**

ISSUE DATE: Wednesday, September 16, 2026

DUE DATE: Monday, October 19, 2026, 2:00 p.m. HST

(Or such later date as may be established by the Office of Hawaiian Affairs by an
Addendum to this RFP)

**ELECTRONIC SUBMISSION TO THE HAWAI‘I EPROCUREMENT SYSTEM
(HiePRO) ONLY.**

Office of Hawaiian Affairs
560 North Nimitz Highway, Suite 200
Honolulu, Hawai‘i 96817

Notice to Offerors

(Chapter 103D, Hawai‘i Revised Statutes)

REQUEST FOR PROPOSALS (“hereinafter “RFP”) No. SI 2027-006

MONDAY.COM CONSULTING, IMPLEMENTATION, OPTIMIZATION & TRAINING

Notice is hereby given that pursuant to Chapter 103D, Hawai‘i Revised Statutes, as amended, (hereinafter “HRS”), the Office of Hawaiian Affairs (hereinafter “OHA”) will be accepting proposals from qualified Monday.com partners and certified Offerors that can provide consulting, implementation, optimization, technical support, training, and knowledge-transfer services for OHA’s existing Monday.com Enterprise environment.

This RFP may be downloaded from either the State Procurement Office (hereinafter “SPO”) website at <https://hiepro.ehawaii.gov/> or the OHA website at <https://www.oha.org/solicitations/> beginning Wednesday, September 16, 2026.

Proposals shall be submitted no later than Monday, October 19, 2026, 2:00 p.m. Hawai‘i Standard Time (hereinafter “HST”). Proposals shall be submitted electronically through the HiePRO website only.

The OHA reserves the right to reject any and all proposals and to accept any proposal in whole or in part when in the best interest of the OHA and the State. Questions relating to this solicitation shall be communicated through HiePRO.

OFFICE OF HAWAIIAN AFFAIRS
Kaiali‘i Kahele
Chairperson, Board of Trustees
Chief Procurement Officer, Head of Purchasing Agency

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Section 1 – Administrative Overview

I. Authority

In 1978, the Article XII of the State of Hawai‘i Constitutional Convention established the Office of Hawaiian Affairs (hereinafter “OHA”) to address the historical injustices and challenges arising out of those circumstances. Chapter 10 of the Hawai‘i Revised Statutes, as amended, outlines the OHA’s duties and purposes, including promoting and protecting the rights of Native Hawaiians.

The OHA is a semi-autonomous public agency of the State of Hawai‘i, with the legal mandate of bettering the conditions of Native Hawaiians. The OHA’s mission is “To mālama (protect) Hawai‘i’s people and environmental resources and the OHA’s assets toward ensuring the perpetuation of the culture, the enhancement of lifestyle, and the protection of entitlements of Native Hawaiians while enabling the building of a strong and healthy Hawaiian people and nation, recognized nationally and internationally.”

The OHA seeks an experienced, certified Monday.com partner to provide consulting, implementation, optimization, technical support, training, and knowledge-transfer services for OHA’s existing Monday.com Enterprise environment.

A determination has been made that the OHA is unable to secure these services through a low bid process. Factors included in the determination are: 1) price is not the primary consideration in determining an award; 2) the resulting contract may need to be other than a fixed price type; 3) the specifications for the services cannot be sufficiently described through low bid process; 4) oral or written discussion need to be conducted with Offerors concerning their proposals; 5) Offerors may need to revise their proposal, including price; and 6) the award needs to be based on a comparative evaluation in order to determine the most advantageous offering to the OHA. To that end, a low bid process is not practicable.

This RFP is issued under the provisions of Chapter 103D, HRS, as amended, and its companion administrative rules. Offerors are charged with presumptive knowledge of all requirements of the cited authorities. Submission of a valid executed proposal by any Offeror will constitute admission of such knowledge on the part of such Offeror.

II. RFP Organization

This RFP is organized into five (5) sections:

Section 1: Administrative Overview – Provides Offeror with an overview of the procurement and contracting process.

Section 2: Scope of Services – Provides Offeror with a general description of the tasks to be performed, delineates Offeror’s responsibilities, and defines deliverables as applicable.

Section 3: Proposal Form and Instruction – Describes the required format and content for the proposal.

Section 4: Proposal Evaluation & Award – Describes how proposals will be evaluated.

Section 5: Attachments

III. Contracting Office

The Contracting Office is responsible for overseeing the procurement and issuing the Contract resulting from this RFP. The Contracting Office is:

Office of Hawaiian Affairs
Procurement Services Program
560 North Nimitz Highway, Suite 200
Honolulu, Hawai‘i 96817

Telephone: (808) 594-1835

The RFP Coordinator is listed below:

Geena Martin
Office of Hawaiian Affairs
Procurement Services Program
560 North Nimitz Highway, Suite 200
Honolulu, Hawai‘i 96817
Email: geenac@oha.org

The OHA reserves the right to change the RFP Coordinator without prior written notice.

The Strategy & Implementation Division is responsible for administering and monitoring the Contract. The designated Contract Administrator or his/her designated representative is responsible for monitoring the activities performed under the Contract and is identified as:

Sheralyn "Kanani" Youart
Office of Hawaiian Affairs
Strategy & Implementation - Economic & Business Resilience
560 North Nimitz Highway, Suite 200
Honolulu, Hawai‘i 96817

Any changes to the Contract Administrator or his/her designated representative will be provided in writing to the Offeror. The OHA reserves the right to make the changes to the Contract Administrator.

Once the Offeror has received the Notice to Proceed, all communications regarding approvals, reports, and requests shall be directed to the Contract Administrator.

IV. Terms and Acronyms

BAFO	Best and Final Offer
BOT	Board of Trustees
COGS	Certificate of Good Standing
CPO	OHA Chief Procurement Officer
DCCA	Department of Commerce and Consumer Affairs
FY	Fiscal Year
GET	General Excise Tax
HAR	Hawai‘i Administrative Rules
HCE	Hawai‘i Compliance Express
HOPA	Head of Purchasing Agency
HRS	Hawai‘i Revised Statutes
HST	Hawai‘i Standard Time
Kūkākūkā	Discussion
OHA	Office of Hawaiian Affairs
RFP	Request for Proposals
STATE	State of Hawai‘i, including its department, agencies, and political subdivisions
SOP	Standard Operating Procedures
SPO	State Procurement Office
USPS	United States Postal Service

V. Procurement Timeline

Activity	Scheduled Dates
Release of Request for Proposals	Wednesday, September 16, 2026
Due Date to Submit Questions in HlePRO	Wednesday, September 23, 2026, 2:00 p.m. HST
OHA’s Response to Questions Posted in HlePRO	Friday, October 9, 2026, 4:00 p.m. HST
Proposals Due in HlePRO	Monday, October 19, 2026, 2:00 p.m. HST
Proposal Evaluations	Tuesday, October 20, 2026 – Friday, October 30, 2026
Offerors’ Presentation/Discussion (if necessary)	TBD
Best and Final Offer (if necessary)	TBD
Notice of Award	November 2026
Contract Start Date	November 2026

The OHA reserves the right to amend or revise the timeline without prior written notice when it is in the best interest of the OHA. The timeline represents the OHA's best estimate of the schedule that will be followed. All times indicated are HST. If a component of this schedule is delayed, the rest of the schedule may be shifted accordingly.

VI. Submission of Questions

Interested Offerors must submit all written questions through HlePRO no later than the date identified in the Procurement Timeline. All written questions will receive a written response from the OHA. The OHA's response to written questions shall be issued in an addendum and available on HlePRO no later than the date identified in the Procurement Timeline. The OHA may refuse to answer any questions received outside of HlePRO or after the questions deadline.

The only official position of the OHA is that which is stated in writing and issued in this RFP and/or as addenda to this RFP. No other means of communication, whether oral or written, will be construed as a formal or official response or statement and may not be relied upon as such.

VII. Submission of Sealed Proposal

- A. Form/Formats. Proposal forms and formats such as for the price proposal are included in Section 5 – Attachments to this RFP.
- B. Proposal Submittal. Offers shall be submitted and received through HlePRO by the due date and time designated in this RFP or such later date as may be established by the OHA by addenda to this RFP. Timely receipt of bid offers shall be evidenced by the date and time registered by HlePRO. Any original bid offers received outside of HlePRO, including faxed, hand-delivered, or e-mailed offers, shall not be accepted or considered for the award. Any offer received after the due date and time shall be rejected.
- C. Pre-opening Modification or Withdrawal. The Offeror may modify or withdraw a proposal before the proposal due date and time. Any change, addition, deletion of attachment(s), or data entry of an Offer may be made prior to the deadline for submittal of offers.
- D. Wages and Labor Law Compliance. Prior to entering into a Contract in excess of \$25,000, an Offeror will certify that it complies with section 103-55, HRS, as amended, entitled "Wages, hours, and working condition of employees of contractors performing services." Section 103-55, HRS, provides that the services to be performed will be performed by employees paid at wages not less than wages paid to public officers and employees for similar work. Offerors are further advised that in the event of an increase in wages for public employees performing similar work

during the period of the Contract, the Offeror will be obligated to provide such increased wages.

Offerors will complete and submit the attached Wage Certificate certifying that the services required will be performed pursuant to section 103-55, HRS. See Attachment 3 – Wage Certificate.

The Offeror will be further obligated to notify his/her employees performing work under this Contract regarding the provisions of section 103-55, HRS, and current wage rates for public employees performing similar work. The Offeror may meet this obligation by posting a written notice to this effect in the Offeror's place of business in an area accessible to all employees.

Offerors are strongly encouraged to account for salary increases as posted by the State of Hawai'i Department of Human Resources Development (hereinafter "DHRD"). The OHA will consider requests for increases as a result of wage increases to public officers and employees during the Contract period or any option period that is not published. At the release of this solicitation, the effective wages through January 1, 2028 for state employees performing similar work have been published by the DHRD.

If wages increase after the execution of the Contract, the Offeror may request an increase in Contract price in order to correspondingly increase the wages of the Offeror's employees performing the work, including any increase in costs for benefits required by law that are automatically increased as a result of increased wages, such as federal old-age benefits, workers' compensation, temporary disability insurance, unemployment insurance, and prepaid health insurance.

The Offeror will not be paid for any reimbursement of retroactive pay negotiated by the State. The Offeror's request for the increase must meet the following criteria:

1. At the time of the offer, if the Offeror's hourly wage rate is greater than the prevailing State wage, the Offeror's requests for increase will not be considered.
2. At the time of the request, the Offeror must or must have provided documentation to show that it is in compliance with section 103-55, HRS (i.e., its employees are being paid no less than the known wage rates of a State position). Documentation will include the employee's payroll records and a statement that the employees are being utilized for this Contract.
3. Request for an increase must be made in writing to the OHA on a timely basis as follows:
 - a. Request for increase for the initial Contract period must be made as soon as practicable after the State wage agreements are made public. Approved requests will be retroactive to the date of increase for the State employees

with adequate documentation that the Offeror provided its employees a wage increase.

- b. To obtain the current wage information, download the information from the Department of Human Resources Development's website at the following address:

<https://dhrd.hawaii.gov/state-employees/classification-and-compensation/>

It is the sole responsibility of the Offeror to comply with section 103-55, HRS, as applicable.

- E. Confidential Information. If an Offeror believes that any portion of a proposal contains information that should be withheld as confidential, the Offeror will request in writing nondisclosure of such information and provide justification to support the designation of confidentiality. Such information will accompany the proposal, be clearly marked, and will be readily separable from the proposal documents to facilitate the eventual public inspection of the non-confidential section of the proposal documents. Note the price and the provisions of the minimum required services are not considered confidential and will not be withheld.

Offerors who choose to identify portions of their proposal as confidential will be responsible for ensuring that the minimum services are not included. The OHA will not make any determination of confidentiality for the Offeror.

If the proposal is marked confidential in its entirety, the OHA Procurement Services Program will not make a determination of confidentiality and will refer any request for information to the OHA's Corporate Counsel Office and/or the State's Office of Information Practices.

- F. Exceptions. Offerors will list any exceptions taken to the terms, conditions, specifications, or other requirements listed herein. Offerors must reference the RFP section where the exception is taken and provide a description of the exception taken and any proposed alternative. The OHA will retain the right to grant exceptions to discretionary policies. Request for exceptions from State, Federal, or local laws will not be approved.

VIII. Discussions with Offerors Prior to Proposal Submissions

Discussion may be conducted with the Offeror to promote understanding of the OHA's requirements.

IX. Opening of Proposals

The date and time recorded for the receipt of any proposals by the OHA, any modification to proposals, and withdrawals of proposals will be the date and time of

receipt registered on HiePRO. The procurement file will be open to public inspection after a contract has been awarded and executed by all parties. Proposals will not be opened at a public proposal opening.

X. Additional Materials and Documentation

Proposal samples or descriptive literature should not be submitted unless specifically requested within the RFP. Offerors may include up to five (5) pages of documentation, literature and samples or brochures of related services which demonstrate experiences to related services.

XI. RFP Amendments

The OHA reserves the right to amend this RFP at any time prior to the proposal submission deadline. Offerors will be notified of the availability of amendments through verbal or written communications. All amendments to this RFP will be posted to the HiePRO website at <https://hiepro.ehawaii.gov/> and to the OHA website at www.oha.org/solicitations.

XII. Additional Terms and Conditions

The OHA reserves the right to add terms and conditions during contract negotiation and discussions. These terms and conditions may be applicable to the scope of the RFP and will not affect the proposal evaluation.

XIII. Trade Secrets/Confidential Information

If an Offeror believes that any portion of their proposal contains information that should be withheld as confidential, the Offeror will provide a written request for nondisclosure of such information to be kept confidential and provide justification to support confidentiality. Such information will accompany the proposal, will be clearly marked, and will be readily separable from the proposal packet to facilitate eventual public inspection of the non-confidential sections of the proposal packet. Note that price is not considered confidential and will not be withheld.

XIV. Intellectual Property Rights

The OHA reserves the right to unlimited, irrevocable, worldwide, perpetual, royalty-free, non-exclusive licenses to use, modify, reproduce, perform, release, display, create derivative works from the work product, to disclose the work product, and to transfer the intellectual property to third parties for the OHA's purposes.

The Offeror understands that the information obtained from these efforts is the sole property of the OHA, that any use of the information must be approved by the Contract Administrator, and that any information and all materials used to complete the project will be returned to the OHA.

XV. Cancellation of the Request for Proposals

The RFP may be canceled and any or all proposals rejected in whole or in part, without liability to the OHA, when it is determined to be in the best interest of the OHA.

XVI. Costs for Proposal Preparation and Verification

Any costs incurred by the Offeror in preparing or submitting a proposal are the Offeror's sole responsibility. Any cost incurred by the Offeror prior to the execution of a contract is not eligible for reimbursement.

Costs incurred in connection with the review, inspection and verification of information provided in the RFP will be the Offeror's sole responsibility.

Offerors will ensure that the OHA is provided with the written authorization(s) necessary to verify information provided in the Offeror's proposal.

XVII. Mistakes in Proposals

While Offerors are bound by their proposals, circumstances may arise where a correction or withdrawal of a proposal is proper. An obvious mistake in a proposal may be corrected, withdrawn, or waived by the Offeror to the extent that it does not conflict with the best interest of the OHA or to the fair treatment of other Offerors. Mistakes in proposals will be handled as provided for in Section 3-122, HAR.

XVIII. Rejection of Proposals

The OHA reserves the right to consider as acceptable and responsive only those proposals submitted in accordance with all requirements set forth in this RFP and which demonstrate an understanding of the problems involved and comply with the service specifications. Any proposal offering any other set of terms and conditions contradictory to those included in this RFP may be rejected without further notice.

A proposal may be automatically rejected for any one (1) or more of the following reasons:

1. Cancellation of solicitations and rejection of offers (HAR §3-122-95);
2. Cancellation of solicitation (HAR §3-122-96);
3. Rejection of offers (HAR §3-122-97);
4. Reporting of anti-competitive practices (HAR §3-122-191 to §3-122-196);
5. Rejection for inadequate accounting system (HRS §103D-314(2));

6. Late proposals (HAR §3-122-16.08);
7. Proposal not responsive (HAR §3-122-97(b) and HAR §3-122-97(c)); and
8. Offer not responsible (HAR §3-122-97(b) and HAR §3-122-97(c)).

XIX. Notice of Award

Any contract arising out of this solicitation is subject to the availability of funding and the approval by the Director as to content, the OHA's Corporate Counsel as to form, and subject to the approval by the OHA's Head of Purchasing Agency or designated signing authority.

The Offeror will receive a Notice of Award which will indicate that the Offeror has been selected to provide the services under this RFP.

No work is to be undertaken by the Offeror prior to the Contract commencement date. The OHA is not liable for any work, contract, costs, expenses, loss of profits, or any damage whatsoever incurred by the Offeror prior to the Contract commencement date as specified in the contract.

Pursuant to section 3-122-112, HAR, Responsibility of Offeror, the Offeror will produce documents to the Procurement Officer to demonstrate compliance with this section.

The Offeror receiving the award will be required to enter into a formal written Contract with the OHA. The General Terms and Conditions of the Contract are attached, and minimum service specifications are included herein. See Attachment 5 – OHA General Terms and Conditions.

XX. Protests

Pursuant to sections 103D-701, HRS, as amended, and 3-126-4 HAR, an actual or prospective Offeror who is aggrieved in connection with the solicitation or award of a Contract may submit a protest. An actual or prospective Offeror may protest the solicitation or award of services only for a serious violation of procurement policies and operational procedures. Only the following matters may be protested:

1. A state purchasing agency's failure to follow procedures established by Chapter 103D, HRS, as amended.
2. A state purchasing agency's failure to follow any statute established by Chapter 103D, HRS, as amended.
3. A state purchasing agency's failure to follow any procedure, requirement, or evaluation criterion in a request for proposals issued by the state purchasing agency.

The Notice of Protest shall be emailed to proposals@oha.org and the Procurement Officer who is conducting the procurement as indicated below within five (5) working days after the aggrieved person knows or should have known of the facts giving rise thereto.

Provided that a protest based upon the content of the solicitation will be submitted in writing prior to the date set for receipt of offers, a protest of an award or proposed award will be submitted within five (5) days after the posting of award of the Contract. Deliveries from other than USPS will be considered hand deliveries and to be submitted on the date of actual receipt by the OHA. Any notice of award letter(s), resulting from this solicitation will be posted on the SPO website at <https://hiepro.ehawaii.gov/> and the OHA website at <https://www.oha.org/solicitations/>.

Head of the OHA Contracting Office	Procurement Officer
Name: Kaiali'i Kahele	Name: Christopher Stanley
Title: Board of Trustees Chairperson, Chief Procurement Officer, Head of Purchasing Agency	Title: Procurement Manager
Mailing: Office of Hawaiian Affairs Address: 560 North Nimitz Highway, Suite 200 Honolulu, Hawai'i 96817	Address: Office of Hawaiian Affairs 560 North Nimitz Highway, Suite 200 Honolulu, Hawai'i 96817

XXI. Availability of Funds

The award of a Contract and any allowed renewal or extension thereof, are subject to the availability and allotment of the OHA funds, State, and/or Federal funds.

XXII. Monitoring and Evaluation

The Offeror's performance under the Contract will be monitored and evaluated by the Contract Administrator or his/her designated representative, the OHA auditor, and/or other designated representatives.

Failure to comply with all material terms of the Contract may be cause for suspension or termination as provided in the General Terms and Conditions. The Offeror may be required to submit additional written reports, including a corrective action plan, in response to monitoring conducted by the OHA. These additional reports will not be considered a change to the scope of work and will continue for a duration of time as deemed necessary by the OHA.

XXIII. General Terms and Special Conditions of Contract

The General Terms and Conditions that will be imposed contractually are included as an attachment. See Attachment 5 – OHA General Terms and Conditions.

Special Conditions may be imposed by the OHA. The OHA reserves the right to make appropriate modifications to the quantity of items or reporting requirements contingent upon unforeseen conditions.

XXIV. Cost Principles

The OHA will utilize standard cost principles from section 3-123, HAR, which are available on the SPO website. Nothing in this section will be construed to create an exemption from any cost principle arising under State and Federal laws.

XXV. Campaign Contributions by State and County Contractor Prohibited

If awarded a Contract in response to this solicitation, the Offeror agrees to comply with §11-355, HRS, which states that campaign contributions are prohibited from a State and County government Contractor during the term of the Contract if the Contract is paid with funds appropriated by the legislative body between the execution of the Contract through the completion of the Contract.

(END OF SECTION)

Section 2 – Scope of Services

I. Information

A. Project overview and history

The OHA seeks an experienced Offeror to provide consulting, implementation, optimization, technical support, training, and knowledge-transfer services for OHA's existing Monday.com Enterprise environment.

The purpose of this engagement is to help OHA improve its current Monday.com environment, reduce manual processes, strengthen reporting and project visibility, improve consistency across boards and workflows, and increase OHA staff's ability to independently maintain and administer the system.

The selected Offeror will work within OHA's existing Monday.com environment rather than implement a new system.

OHA currently uses Monday.com Enterprise with approximately:

- 12 users;
- 65 boards; and
- 8 workspaces.

The environment is actively used for program, project, procurement, contract, task, deliverable, and operational tracking.

Existing functionality includes boards, dashboards, automations, formulas, permissions, templates, connected boards, mirror columns, timelines, dependencies, and reporting.

External system integrations are not anticipated under the base scope of this engagement.

B. Funding source and period of availability

Funds are subject to the biennium budget as approved by the OHA Board of Trustees (BOT) and/or allocation by the Governor and State Legislature. Funding and period of availability may change upon written notice by the OHA.

It is understood that the contract will not be binding unless the OHA can document that there is an available and unexpended appropriation or balance of an appropriation over and above all outstanding contracts sufficient to cover the amount required by the contract. Any contract entered into as a result of this RFP is binding only to the extent that funds are certified as available and allocated and received by the OHA.

The availability of funds in excess of the amount certified as available shall be contingent upon future appropriations or special fund revenues.

It has been determined that there are sufficient funds to pay for the initial term of the Contract and the funds necessary for the remaining term(s) of the Contract are likely to be available from the OHA. Pursuant to Chapter 103D-315, HRS, as amended, the OHA reserves the right to cancel the contract when future funds are not available to support continuation of performance in subsequent contract periods. Nothing in this RFP shall be interpreted to mean that the OHA shall be liable to pay for services provided.

II. General Requirements

A. Qualifying Requirements

1. The Offeror will comply with section HRS §103D-601, as amended, entitled “Cost principles rules required.”
2. The Offeror must have no outstanding balances owing to the OHA. Exception may be granted by the Administrator of the OHA for debts recently acquired and for debts for which a repayment plan has been approved by the Administrator of the OHA.
3. Offerors are advised that if awarded a Contract, the Offeror must furnish proof of compliance with the requirements of Section §3-122-112, HAR.
 - a. Chapter 237, HRS, General Excise Tax Law;
 - b. Chapter 383, HRS, Hawai‘i Employment Security Law;
 - c. Chapter 386, HRS, Workers’ Compensation Law;
 - d. Chapter 392, HRS, Temporary Disability Insurance;
 - e. Chapter 393, HRS, Prepaid Health Care Act; and
4. Be registered and incorporated or organized under the laws of the State of Hawai‘i (hereinafter “Hawai‘i business”).

The Offeror(s) will be one (1) of the following:

- a. Hawai‘i business: A business entity referred to as a “Hawai‘i business” is registered and incorporated or organized under the laws of the State of Hawai‘i. As evidence of compliance, the Offeror will submit a CERTIFICATE OF GOOD STANDING issued by the Department of Commerce and Consumer Affairs Business Registration Division (hereinafter

“DCCA”). A Hawai‘i business doing business as a sole proprietorship is not required to register with the DCCA, and therefore not required to submit the certificate. An Offeror’s status as sole proprietor or other business entity and its business street address will be used to confirm that the Offeror is a Hawai‘i business.

- b. Be registered to do business in the State of Hawai‘i (hereinafter “compliant non-Hawai‘i business”).

Compliant non-Hawai‘i business: A business entity referred to as a “compliant non-Hawai‘i business,” is not incorporated or organized under the laws of the State of Hawai‘i but is registered to do business in the State. As evidence of compliance, the Offeror will submit a CERTIFICATE OF GOOD STANDING.

5. Business Office

The Offeror must have, at a minimum, a telephone number and electronic mail address from which it conducts business and be accessible by telephone from 7:45 a.m. to 4:30 p.m. HST, for meetings, teleconferences, video conferences, concerns or requests that need immediate attention. An answering service is not acceptable. The office location, telephone number, and electronic mail address will be identified in the Offerors’ proposal.

6. Certificate of Eligibility

The Offeror will demonstrate compliance with the following:

- a. The Hawaii Compliance Express (hereinafter “HCE”), which allows businesses to register online through a simple wizard interface at:

<https://vendors.ehawaii.gov/hce/>

The HCE provides the applicant with a “Certificate of Vendor Compliance” with current compliance status as of the issuance date, accepted for both contracting purposes and final payment. Businesses that elect to use the new HCE services will be required to pay an annual fee of \$12.00 to the Hawai‘i Information Consortium, LLC (hereinafter “HIC”).

This single certificate eliminates the need to obtain individual copies of clearances with the following agencies:

- i. Department of Taxation (DOTAX) – Form A-6,
- ii. Internal Revenue Service (IRS) – Tax Compliance Report (TCR),
- iii. Department of Commerce and Consumer Affairs (DCCA) – Form COGS, and
- iv. Department of Labor & Industrial Relations (DLIR) – Form LIR27

7. Indemnification

The Offeror will defend, indemnify, and hold harmless the State of Hawai‘i, the OHA, its elected and appointed officials, officers, agents and employees, from and against all liability, loss, damage, cost, and expense, including attorneys’ fees, and all claims, suits, and demands arising out of or resulting from the acts or omission of the Offeror or the Offeror’s officers, employees, agents or subcontractors.

8. Insurance Requirements

To be eligible for award, the Offeror agrees to acquire insurance from an insurance carrier or carriers licensed to conduct business. Prior to the Contract start date, the Offeror shall furnish to the Contracting Office a valid certificate(s) of insurance as evidence of the existence of the following insurance coverage in the amount not less than the amounts specified. The insurance must be maintained in full force and effect throughout the entire performance period. Failure to maintain the required insurance is considered a material default of the Contract.

<u>Coverage</u>	<u>Limits</u>
Commercial General Liability (including personal injury, death, and property damage)	\$2,000,000 per occurrence; \$2,000,000 general aggregate per policy year; \$2,000,000 product and completed operations aggregate limit per policy year.
Personal and Advertising Injury	\$1,000,000 each occurrence. \$2,000,000 aggregate.
Umbrella Liability	
Automobile Insurance covering all owned, non-owned, and hired automobiles	Bodily injury liability limits of \$1,000,000 each person and \$1,000,000 per accident; property damage liability limits of \$1,000,000 per accident. Or \$2,000,000 combined single limit.
Workers Compensation as required by laws of the State of Hawai‘i	Insurance to include Employer’s Liability. Such coverage shall apply to all employees of the Offeror and (in case any sub-contractor fails to provide adequate similar protection for all its employees) to all employees of sub-contractors
Professional Liability (Errors and Omissions)	\$1,000,000 per claim \$2,000,000 annual aggregate

- a. The State of Hawai‘i, the OHA, its elected and appointed officials, employees, and volunteers shall be named added as additional insured with respect to occurrences during or in connection with the performance of this contract. Before the effective date of this contract, the Offeror agrees to provide the OHA with certificate(s) of insurance necessary to satisfy the OHA that the insurance provision of this contract have been complied with and to keep such certificate(s) on deposit with the OHA during the entire term of this contract. The minimum insurance required shall be in full compliance with the Hawai‘i Insurance Code throughout the entire term of the contract, including supplemental contracts, and shall be written by a company authorized to do business in the State of Hawai‘i and rated no less than an AM Best rating of A-VIII. The Offeror and its carriers agree to waive their rights of subrogation with respect to any claims covered, or which should have been covered, by valid and collectible insurance, including any deductibles or self-insurance maintained thereunder. Upon request by the OHA, the Offeror shall furnish a copy of the policy or policies that satisfy the insurance requirements of this Contract.
- b. Failure of the Offeror to provide and keep in force such insurance shall be regarded as a material default under this contract, entitling the OHA to exercise any or all the remedies provided in this contract for default of the Offeror.
- c. The procuring of such required policy or policies of insurance shall not be construed to limit the Offeror’s liability hereunder or to fulfill the indemnification provisions and requirements of this Contract. Notwithstanding said policy or policies of insurance, the Offeror shall be obliged for the full and total amount of damage, injury, or loss cause by negligence or neglect connected with this Contract.
- d. To satisfy the minimum coverage limits required by this Contract, the Offeror may use an umbrella policy in addition to the mandatory insurance policies (e.g, general liability insurance, automobile Insurance, and workers’ compensation) provided that the OHA approves, and the umbrella policy follows the underlying coverage forms.
- e. The Offeror shall notify the OHA in writing of any cancellation or substantive change in insurance at least thirty (30) calendar days prior to the effective date of such cancellation or change.
- f. The OHA is a self-insured semi-autonomous state agency. The Offeror’s insurance shall be primary. Any insurance maintained by the State of Hawai‘i and the OHA shall apply in excess of and shall not contribute to insurance provided by the Offeror.

g. Other Additional Insurance

The Offeror may, at its own expense, obtain additional insurance coverage for further protection subject to the OHA's approval. Request for approval will include a description of the additional insurance coverage, the amount of the premium, and justification for additional insurance.

B. Type of Contract

1. The Offeror will be required to execute a contract for goods and services based on competitive sealed proposals.

This is a labor-hour contract which provides payment for work satisfactorily performed at the selected Offeror's fixed hourly rate.

Subsequent to the award and within ten (10) days after the prescribed forms are presented for signature, the Offeror will execute and deliver to the OHA a contract in such number of copies as required by the OHA.

The Offeror will be required to enter into a formal written contract with the OHA in accordance with the laws, rules, and regulations of the State of Hawai'i. The stated requirement appearing elsewhere in this RFP will be incorporated and will become part of the terms and conditions of the contract.

By submission of a proposal, the Offeror warrants and represents that they have read and are familiar with the contractual and service requirements set forth in the RFP and its attachments, the provisions of which are expressly incorporated into this RFP by reference.

All proposals will become the property of the OHA. The Offeror's proposal will be incorporated in the resulting contract by reference.

2. Subcontracting

No work or services will be subcontracted. All persons engaged in performing the work covered by the contract will be considered employees of the Offeror.

3. Contract Modification

The contract may be modified only by a written supplemental contract signed by the OHA and the authorized signatory designated to sign contracts on behalf of the Offeror as designated in a corporate resolution, if applicable.

4. Additional Services and Fees

The Offeror and the OHA will negotiate for additional needed services and fees for work not described in the contract by which may arise during the course of the contract. Any agreement will be in writing, executed by all parties, and shall be attached to the contract as a contract amendment to expire at the same time as the original contract or subsequent period.

5. Laws, Rules, Ordinances and Regulations

Reference to Federal, State, City and County laws, ordinances, rules and regulations and standard specifications will include any amendment thereto effective as of the date of the RFP.

6. Bonds

No performance or payment bond is required.

C. Multiple or Alternate Proposals (Refer to HAR §3-122-4)

☐ Allowed ☒ Not allowed

D. Single or Multiple Contract to be Awarded (Refer to HRS §103D-322)

☒ Single ☐ Multiple ☐ Single & Multiple

E. Single or Multi-Term Contract to be Awarded (Refer to HRS §103D-315)

☐ Single term ☒ Multi-term

Initial term of contract: Ten (10) months

Length of each extension: Up to twelve (12) months

Maximum Length of Contract: Not to exceed sixty (60) months

F. Condition for Contract Extensions

The initial period will commence on the contract start date. The following conditions must be met for an extension:

1. The Offeror experienced cost savings and has unexpended funds available that can be used to provide additional goods and services; or
2. The OHA determines there is an ongoing need for the services and has funds to extend services not to exceed sixty (60) months. Contract extensions will be awarded as agreed upon in the primary contract. Exceptions will be granted upon satisfactory justification such as increase in cost of goods or services; and
3. A supplemental contract must be executed prior to expiration of the primary contract; and

4. The Offeror must obtain the OHA's approval in writing.

The option to extend the contract will be at the sole discretion of the OHA. The contract will be extended at the same rates as proposed in the original proposal unless price adjustments are negotiated. Submission of a proposal constitutes acknowledgement by the Offeror that the Offeror is able and willing to contract for services for the duration of the contract period. If the Offeror is unwilling or unable to fulfill the scope of services described in the contract, the OHA reserves the right to assign the costs of re-procurement to any payment owed under the contract. These costs may include without limitations reproduction costs, staff time, and postage.

The Offeror will provide the requested insurance information and a completed wage certificate. The Offeror will pay the State of Hawai'i general excise tax and all other applicable taxes.

G. Contract price adjustments (other than wage rate increases)

Each proposal offered will be firm for a ten (10) month period upon issuance of the Notice to Proceed.

Contract price adjustments will be limited to liability and/or automobile insurance. The following conditions must be met for the OHA to consider a price adjustment:

1. The Offeror provides adequate documentation of price increase(s), such as an insurance policy statement;
2. The increase will not exceed five percent (5%) of the original price for each budget line item; and
3. The request for increase must be reasonable and there must be sufficient funding available to support the increase.

III. Contract Monitoring and Remedies

A. Monitoring

1. The satisfactory provision of goods and services will be monitored by the Contract Administrator. Performance will be monitored on an ongoing basis by the OHA through desk monitoring and/or other methods by the Contract Administrator and his/her designated representative(s).
2. Should the Offeror fail to comply with the requirements of the contract, the OHA may request a written corrective action plan, a timeline for implementation, and the responsible parties to the OHA. The OHA will monitor the Offeror for implementation of the corrective action plan. The OHA reserves the right to

request regular or additional report(s) on progress towards compliance with the contract and the corrective action plan.

3. Should the Offeror continue to fail to comply with the requirements of the contract, the OHA reserves the right to engage the services of another to perform the services to remedy the defect or failure and to deduct such costs from monies due to the Offeror or to directly assess the Offeror.
4. In the event the Offeror fails, refuses, or neglects to perform the services in accordance with the requirements of this RFP and the contract, the OHA reserves the right to purchase in the open market corresponding services and to deduct this cost from the monies due or that may thereafter become due to the Offeror. If monies due to the Offeror is insufficient for this purpose, the Offeror shall pay the difference upon demand by the OHA. The OHA may also utilize all other remedies provided under the contract and/or as permitted by law.
5. In the event the Offeror is not performing the required services as contracted, the OHA reserves the right to extend the contract for intervals of less than twelve (12) months. During this time, the OHA will monitor the Offeror's performance and/or improvement and the implementation of its corrective action plan to determine whether the OHA will continue to contract with the Offeror.

B. Termination

The OHA reserves the right to terminate the contract without penalty for cause or convenience as provided in the General Terms and Conditions. See Attachment 5 – OHA General Terms and Conditions.

IV. Scope of Services

- A. The Offeror, a certified Monday.com partner, shall provide and perform the services set forth below in a satisfactory and proper manner as determined by the OHA, on an as-needed basis and as prioritized by the OHA based on operational needs, and in accordance with the terms and conditions of this Contract.

The services shall include, but may not be limited to, the following:

1. System Assessment and Optimization
 - a. Review the OHA's existing boards, workspaces, dashboards, automations, formulas, permissions, templates, reporting structures, dependencies, and connected boards.
 - b. Identify opportunities to simplify, standardize, and improve the existing environment.
 - c. Recommend improvements to board and workspace architecture, naming conventions, permissions, governance, reporting, and system sustainability.

- d. Identify opportunities to reduce unnecessary manual processes and improve workflow efficiency.
2. Boards, Workflows, and Templates
 - a. Create, configure, and improve boards and templates for projects, programs, procurement, contracts, tasks, deliverables, and other operational needs.
 - b. Develop standardized and reusable templates and workflows.
 - c. Configure timelines, milestones, dependencies, formulas, permissions, Gantt views, connected boards, mirror columns, and related Monday.com functionality.
 - d. Reorganize, consolidate, migrate, or archive existing boards when authorized by the OHA.
3. Dashboards and Reporting
 - a. Create and improve dashboards and reporting views.
 - b. Develop KPI, project, program, portfolio, and leadership-level reporting.
 - c. Improve the OHA's ability to monitor project status, progress, risks, bottlenecks, dependencies, overdue work, and other key information.
4. Automations

Services may include creating and improving automations that reduce manual work and support:

 - a. Notifications and reminders;
 - b. Follow-up activities;
 - c. Escalations;
 - d. Recurring activities;
 - e. Status changes;
 - f. Dependencies;
 - g. Due dates; and
 - h. Other workflow needs.
5. Troubleshooting and Technical Support
 - a. Troubleshoot issues involving boards, dashboards, automations, formulas, permissions, connected boards, mirror columns, and reporting.
 - b. Test and correct configurations.
 - c. Provide recommendations regarding appropriate use of Monday.com Enterprise functionality and best practices.
6. Training and Knowledge Transfer
 - a. Beginner- to intermediate-level training for the OHA staff.
 - b. Administrator-level knowledge transfer for the designated OHA staff.
 - c. User guides, administrator guides, quick-reference materials, configuration documentation, and other support materials.
 - d. Documentation of completed work so the OHA staff can maintain and modify configurations after the Offeror's work is completed.

- e. Unless separately authorized by OHA, services will use native Monday.com functionality. External system integrations are outside the anticipated base scope.
7. Deliverables – Because services will be requested on an as-needed basis, specific deliverables will depend on individual work requests.

Deliverables may include:

- a. Configured and tested boards and templates;
 - b. Dashboards and reporting views;
 - c. Automations and workflow configurations;
 - d. KPI and portfolio reporting;
 - e. Optimized workspace and board structures;
 - f. Process and workflow recommendations;
 - g. Standardized templates;
 - h. Reorganized, consolidated, migrated, or archived boards;
 - i. Configuration and technical documentation;
 - j. User and administrator guides;
 - k. Quick-reference materials;
 - l. Training materials;
 - m. Training sessions and recordings when requested;
 - n. Knowledge-transfer documentation;
 - o. Transition documentation; and
 - p. Other approved Monday.com work products.
8. Review and Acceptance
- OHA will review and, where appropriate, test completed work before acceptance. Work will be considered complete when it meets the requirements established for the applicable work request and is accepted by OHA.
- If work does not meet the agreed-upon requirements because of Offeror error, incomplete work, or incorrect configuration, the Offeror will be responsible for correcting the issue at no additional cost to OHA.
- Changes or additional requirements requested by OHA after the original work request has been approved may require additional authorized hours.
9. Estimated Level of Effort
- OHA anticipates approximately 60 hours of professional services during the initial 10-month term. The 60 hours are an estimate for planning and pricing purposes and do not guarantee a minimum amount of work. Actual utilization may vary based on OHA priorities, operational needs, project complexity, available funding, and individual work requests. Work may not be evenly distributed throughout the contract. Some periods may require more support, while other periods may require little or no support.

10. Work Assignment and Authorization

- a. Services will be provided on an as-needed, priority-driven basis.
- b. The OHA Contract Administrator, or authorized designee, will serve as the primary point of contact for assigning, prioritizing, reviewing, approving, and accepting work.
- c. Before beginning a substantive work request, the Offeror may be required to provide:
 - i. A description of the requested work;
 - ii. Estimated hours;
 - iii. Expected deliverable or outcome;
 - iv. Relevant assumptions or dependencies; and
 - v. Estimated completion date.
- d. Work must be authorized by OHA before it begins.
- e. The Offeror must obtain prior approval before exceeding approved hours, an approved estimate, or the authorized scope.
- f. OHA will not be responsible for payment for unauthorized work or hours exceeding an approved authorization without prior approval.

11. Schedule and Delivery

- a. OHA's normal business hours are 7:45 a.m. to 4:30 p.m. Hawai'i Standard Time, Monday through Friday, excluding State holidays.
- b. The Offeror will not be required to remain continuously available or on standby during OHA business hours.
- c. For work requested outside normal business hours, OHA anticipates providing approximately three to five business days of advance notice when practicable.
- d. Services may be performed remotely.
- e. Routine on-site work and travel are not anticipated.

12. Key Personnel

- a. The Offeror must identify the individual or individuals who will perform substantive services for the OHA.
- b. At least one key individual responsible for technical delivery must personally demonstrate at least three (3) years of professional, hands-on Monday.com experience, including at least one (1) year of professional, hands-on Monday.com Enterprise experience.
- c. The Offeror should identify each key person's proposed role, relevant experience, credentials, and anticipated responsibilities.
- d. Material changes to key personnel following contract award will require the OHA's approval. Replacement personnel should have qualifications and experience equal to or greater than those of the individual being replaced unless otherwise approved by the OHA.

13. No Subcontracting – Subcontracting is not permitted. All services must be performed directly by employees or principals of the awarded Offeror.

14. Production Environment, Security, and Confidentiality

- a. The Offeror will work within an active OHA Monday.com environment.
- b. Material changes to existing production boards, automations, dashboards, permissions, formulas, connected boards, or reporting must be authorized by OHA.
- c. Where practical, changes should be tested before implementation.
- d. For significant configuration changes, the Offeror should document the existing setup sufficiently to support restoration or correction if the change causes an unintended issue.
- e. The Offeror must promptly notify OHA of significant configuration errors, unintended automations, data loss, access issues, reporting disruptions, or other adverse impacts resulting from its work.
- f. Access to OHA systems and information will be limited to authorized Offeror personnel and used only to perform services under the contract.
- g. OHA credentials, data, screenshots, configurations, and other OHA information may not be shared with unauthorized individuals or entities.

15. Ownership

- a. OHA will retain ownership and control of its data and OHA-specific boards, dashboards, automations, configurations, templates, reports, documentation, and other work products created specifically for OHA, subject to the final contract terms.
- b. The Offeror may retain ownership of pre-existing proprietary tools, methodologies, templates, or materials.
- c. If Offeror-owned materials are incorporated into an OHA-specific solution, OHA must have sufficient rights to continue using, maintaining, and modifying the completed solution for OHA business purposes.
- d. Solutions should not be designed in a way that unnecessarily requires continued Offeror involvement for routine maintenance or administration.

16. Knowledge Transfer

- a. Knowledge transfer is an expected part of this engagement.
- b. The Offeror will provide sufficient explanation and documentation so the designated OHA staff can reasonably understand, maintain, administer, and modify completed work.
- c. Upon the OHA's request, the Offeror may be required to provide:
 - i. Status of outstanding work;
 - ii. Configuration documentation;
 - iii. Administrator notes;
 - iv. Known issues or limitations;
 - v. Recommended next steps; and
 - vi. Other information reasonably necessary for the OHA to continue managing its Monday.com environment.

17. Reporting and Invoicing

- a. The Offeror will maintain sufficient records for the OHA to understand work requested, work in progress, work completed, hours used, and significant issues or risks.

Invoices must identify:

- i. Billing period;
 - ii. Dates of service;
 - iii. Applicable work request or task;
 - iv. Description of work performed;
 - v. Person performing the work;
 - vi. Hours worked;
 - vii. Hourly rate; and
 - viii. Total amount billed.
- b. The OHA will pay only for work that is authorized, within scope, actually performed, properly documented, and accepted.
 - c. Time required to correct Offeror-caused errors, incomplete work, or incorrect configurations will not be separately billable to the OHA.

18. Certified Monday.com Partner

The Offeror shall maintain its status as a certified Monday.com partner throughout the term of this contract, and any extensions.

- B. The OHA Contract Administrator shall act as the contract monitor and principal liaison between the Offeror and the OHA. The OHA Contract Administrator shall assist in resolving policy questions, expediting decisions, and the review of the work performed.

V. Qualifications and Requirements

A. Specific Qualifications and Requirements

1. The Offeror shall ensure that all personnel meet the minimum qualifications, including licensing and experience requirements.
2. Certified Monday.com Partner Requirement
 - a. The OHA requires Offerors to be currently certified Monday.com partners. It is a minimum qualification and is required for a proposal to be accepted. Offerors submitting proposals without current certified Monday.com partner status will be rejected. Expired certifications will not be accepted.
 - b. Offerors with certified Monday.com partner must provide sufficient information for the OHA to verify the certified status. Verification may include a current listing or profile in Monday.com's official Partner Marketplace/Find a Partner directory, current documentation issued by Monday.com, confirmation from Monday.com, or other official Monday.com documentation that reasonably verifies current certified status.

- c. An Offeror's absence from the public partner directory will not, by itself, establish that the Offeror is not a certified partner if other official Monday.com documentation sufficiently verifies current certified status.
- 3. Minimum Requirements for Professional Monday.com Experience
 - a. The Offeror must demonstrate a minimum of:
Three (3) years of professional, hands-on experience working with Monday.com and at least one (1) year of professional, hands-on experience working with Monday.com Enterprise.
 - b. Professional experience may include consulting, implementation, configuration, administration, optimization, troubleshooting, dashboards, reporting, workflow automation, governance, training, or similar Monday.com services.
 - c. Experience using Monday.com Free, Basic, Standard, or Pro may count toward the three-year experience requirement, provided the Offeror also demonstrates at least one year of professional Monday.com Enterprise experience.
 - d. Experience with other work-management or project-management platforms will not substitute for the required Monday.com experience.
- 4. Verification of Years of Experience
 - a. Verification of years of experience is separate from the client reference requirement. The Offeror shall provide a concise experience summary sufficient for the OHA to verify that the minimum experience requirements have been met.
The experience summary should identify, as applicable:
 - i. Organization or client;
 - ii. Approximate dates or period of experience;
 - iii. Role performed;
 - iv. Type of Monday.com work performed;
 - v. Monday.com version or plan, when known; and
 - vi. Whether the experience involved Monday.com Enterprise.
 - vii. Relevant professional experience may include work performed as a consultant, contractor, employee, administrator, implementation specialist, or other professional role involving substantive hands-on use of Monday.com.
 - b. The OHA may request clarification or reasonable supporting documentation when needed to verify claimed experience. Extensive documentation for every project is not required.
- 5. Preferred and Evaluated Qualifications
 - a. The OHA may also consider the following as comparative strengths:
 - i. Monday.com experience beyond the three-year minimum;
 - ii. Monday.com Enterprise experience beyond the one-year minimum;
 - iii. Depth and complexity of relevant Enterprise implementations;

- iv. Experience with multiple workspaces and interconnected boards;
- v. Experience creating executive, portfolio, program, and project dashboards;
- vi. Advanced experience with automations, formulas, permissions, connected boards, mirror columns, dependencies, Gantt views, and reporting;
- vii. Experience simplifying manual or poorly structured processes;
- viii. Experience standardizing workflows across programs or teams;
- ix. Strong troubleshooting, quality-control, documentation, and training capabilities;
- x. Demonstrated ability to transfer knowledge to internal staff;
- xi. Quality and relevance of previous work; and
- xii. Ability to develop solutions that are practical, maintainable, and appropriate for the OHA's needs.

The OHA is seeking practical expertise and does not want unnecessary technical complexity.

B. Administrative Requirements

1. The Offeror shall designate a contact person who will be responsible for project oversight and ensure contract performance. The contact person will be able to respond to the OHA's inquiries, complaints, and/or problems within one (1) working day.
2. The Contract Administrator may send a monitoring report to the Offeror's contact person. The monitoring report will document any discrepancies or contract violation(s) for correction within the designated time period provided.

C. Personnel

1. All personnel will be considered employees or agents of the Offeror.
2. The Offeror will ensure that all personnel meet the minimum qualifications, including State licensing laws and experience requirements. The current wage rates and position class specifications for personnel are available at the following addresses:

<https://dhrd.hawaii.gov/state-employees/classification-and-compensation/>

3. All staff training such as training required to ensure that the minimum services are provided in compliance with State, Federal, and/or County laws, ordinances, rules, and regulations, and will be the responsibility of the Offeror.

4. The Offeror will be solely responsible for the behavior and conduct of its employees or agents while on the OHA property. Supervision will be the responsibility of the Offeror.
5. The Offeror will ensure the confidentiality of all information, documents, or materials viewed or discussed. The Offeror's personnel will not disclose confidential information to the general public without the expressed written consent of the OHA by either policy, rules, or letter. The Offeror's personnel shall complete and sign the OHA non-disclosure agreement prior to execution of the contract.
6. During the performance of this contract, the Offeror agrees not to discriminate against any employee or applicant for employment. The Offeror will take affirmative action to ensure equal treatment of its employees. Such actions will include, without limitation, the following: employment, upgrading, demotion, or transfer, recruitment or recruitment advertising, layoff or termination, rates of pay or other forms of compensation, and selection for training, including apprenticeship. The Offeror will insert provisions similar to the foregoing in all subcontracts.
7. The Offeror agrees to remove any of its employees from services to the OHA upon written request by the Contract Administrator. At the request of the OHA, the Offeror will remove forthwith and will not employ in any portion of the work, any person who, in the opinion of the OHA, does not perform his/her duties and responsibilities in a proper and skillful manner, is intoxicated, disorderly, abusive, or unable to demonstrate tact and diplomacy in dealing with the public.

D. Reporting Requirements

The Offeror will be responsible for providing progress and status reports as requested by OHA throughout the duration of the contract.

E. Payment

1. The OHA will have thirty (30) calendar days after receipt of invoice and satisfactory delivery of goods or performance of the services to make payment. For this reason, the OHA will reject any proposal submitted with a condition requiring payment within a shorter period.
2. The OHA will reimburse the Offeror for all salaries, wages, related taxes, other related administrative expenses and reimbursable expenses as agreed to in the contract.
3. The Offeror will submit invoices for payment listing dates of services performed with an itemized breakdown of expenses and costs.

4. The Offeror will clearly indicate any adjustment made to the billing statement for work not performed.
5. The Offeror shall submit original invoices:
 - a. By electronic mail to (a) invoices@oha.org and (b) to the email address of the Contract Administrator for this Contract or
 - b. By U.S. postal mail to:

Office of Hawaiian Affairs
Attn: Financial Services
560 North Nimitz Highway, Suite 200
Honolulu, Hawai'i 96817
6. The OHA is encouraging the Offeror to participate in Automated Clearing House (hereinafter "ACH") payment processing in order to expedite payments and to reduce the OHA's in-office staffing needs. If the Offeror is interested in ACH payment processing, please contact our Accounting Department through your designated Contract Administrator.
7. All invoices shall reference the Contract number and Purchase Order number assigned to the contract. Payments will be processed upon confirmation by the Contract Administrator that the Offeror has satisfactorily performed as specified in the contract.

(END OF SECTION)

Section 3 – Proposal Format and Instructions

I. General Instructions for Completing Forms

When an Offeror submits a proposal, it will be considered a complete plan for accomplishing the tasks identified in this RFP. The Offeror's proposal must demonstrate an understanding of and the ability to meet and perform all contractual requirements listed in this RFP.

The submission of a proposal will constitute the Offeror's indisputable representation of compliance with every requirement of the RFP and that the RFP documents are sufficient in scope and detail to indicate and convey a reasonable understanding of all terms and conditions of performance of the work to the Offeror.

All Offerors shall submit their proposal via HiePRO.

Before submitting a proposal, each Offeror must:

1. Thoroughly examine the solicitation documents. Solicitation documents include this RFP, any attachments, plans referred to therein, and any other relevant documentation.
2. Be familiar with Federal, State, and County laws, ordinances, rules and regulations that may in any manner affect cost, progress, or performance of the work.

Proposals will be submitted to the OHA in the prescribed format outlined in this RFP. A written response is required for each item unless indicated otherwise.

Offerors may attach to their proposal supplemental literature, brochures or other information, which may demonstrate related experience in the proposal package.

II. Proposal Forms

- A. The proposal forms will be completed and submitted to the OHA by the required due date and time and in the form prescribed by the OHA.
- B. Offerors will submit their proposals under the Offeror's exact legal name that is registered with the State of Hawai'i Department of Commerce and Consumer Affairs and will indicate that this is its exact legal name. Failure to do so may delay proper execution of the contract.
- C. Offerors' authorized signature must be an original signature in ink, required before any award may be made, or an electronically signed signature with an audit trail. If the proposal is unsigned or the affixed signature is a facsimile or a photocopy, the

proposal will be automatically rejected. If the proposal is not signed by an authorized signatory as shown on the corporate resolution, the proposal will be automatically rejected.

- D. A proposal security deposit is not required for this RFP.
- E. The numerical outline for the application, the titles and/or subtitles, and the Offeror name and RFP identification information on the top right-hand corner of each page should be included.
- F. Consecutive page numbering of the proposal application should begin with page one (1) and end with the last numbered page of the complete proposal.
- G. Other supporting documents may be submitted in an Appendix, including visual aids, to further explain specific points in the proposal. If used, they should be referenced.

III. Proposal Application

A. Cover Letter

A Cover Letter will be included in the proposal. See Attachment 2 – Sample Cover Letter. The Cover Letter shall include the following requirements:

1. Be printed on official business letterhead;
2. Original signature by an authorized signatory;
3. The following statement:

“The undersigned has carefully read and understands the terms and conditions specified in the RFP No. SI 2027-006 and in the General Terms and Conditions and hereby submits the following Proposal to perform the work specified herein, all in accordance with the true intent and meaning thereof.

The undersigned further understands and agrees that by submitting their Proposal, 1) he/she is declaring his/her Proposal is not in violation of Chapter 84, Hawai‘i Revised Statutes, concerning prohibited State Contracts, 2) he/she is certifying that the price(s) submitted was (were) independently arrived at without collusion, and 3) he/she hereby authorizes the Office of Hawaiian Affairs to verify information provided in this Proposal.”;

4. The exact legal name and address of the Offeror;
5. Contact person’s name, telephone number, and e-mail address;

6. A statement indicating that the Offeror is a corporation or other legal entity and the taxpayer identification number of the legal entity; and
7. A statement that the Offeror is or will be registered to do business in Hawai‘i and has or will obtain a State General Excise Tax license before the start of the work.

B. Wage Certificate

See Attachment 3 – Wage Certificate.

C. Offer Form OF-1 and OF-2

Pricing shall be submitted on Offer Form OF-1 and OF-2. See Attachment 4 – Offer Form OF-1 and OF-2. The price shall be the all-inclusive cost, including the general excise tax, to the OHA. No other costs shall be honored. Any unit price shall be inclusive.

D. Addenda

The RFP addenda and the other information and materials shall be provided by the OHA through HlePRO, including additions or changes with respect to the dates in the Procurement Timeline. The Offeror is responsible for monitoring HlePRO to obtain any RFP addenda or other information relating to the RFP.

E. Experience and Capability

The OHA requires the Offeror to have a minimum of three (3) years of professional, hands-on experience working with Monday.com, and at least one (1) year of professional, hands-on experience working with Monday.com Enterprise.

1. Necessary Skills and Experience

The Offeror will demonstrate that it has the necessary skills, abilities, knowledge, and experience relating to the delivery of the proposed services. The Offeror will also provide a listing of verifiable experiences with projects or contracts related to the services that were provided to a government agency or private entity within the last five (5) years.

See Section 2 - Scope of Services Item V “Qualifications and Requirements”.

2. Professional References

The Offeror shall provide three (3) professional client references involving relevant Monday.com services. References will be used to evaluate past performance and experience performing work similar to OHA’s anticipated needs; they are not required to establish the Offeror’s total years of experience.

Each reference should include:

- a. Client organization;
- b. Contact name and title;
- c. Contact information;
- d. Approximate dates of service;
- e. Brief description of services performed; and
- f. Monday.com version or plan associated with the engagement, when known.

OHA may contact references to evaluate quality of work, technical capability, responsiveness, reliability, communication, problem solving, ability to meet expectations, training and knowledge transfer, and overall client satisfaction.

3. Representative Work Samples

- a. Offerors should provide a limited number of representative work samples that demonstrate relevant Monday.com capabilities. Examples may include redacted dashboards, boards, workflows, automations, reports, training materials, user guides, or similar work products.
- b. Confidential or proprietary client information may be redacted. The purpose of the work samples is to demonstrate capability and relevance, not to require an extensive professional portfolio.

4. Quality Assurance, Evaluation, and Resolution

The Offeror will describe its quality assurance and evaluation plans for the proposed services, including methodology. Evaluation plans must include client surveys as appropriate. The Offeror will also describe its issue escalation and resolution process as it relates to the scope of and completion of the scope of work and/or if there are disagreements between the OHA and the Offeror.

5. Coordination of Services

The Offeror will demonstrate the capability to coordinate services with other agencies and resources in the community.

6. Past Performance

The OHA reserves the right to verify the documented experience directly with the owner/contact person as submitted in the proposal. Only information that is submitted directly to the OHA in the proposal package will be considered unless the OHA seeks additional information during the RFP evaluation process. The OHA reserves the right to review and consider past performance the Offeror may have had with the OHA.

F. Personnel – Project Organization and Staffing

1. Proposed Staffing

This section will describe the staff necessary and the specific times available to ensure the performance of work in an accurate and timely manner. Staff titles, qualifications and expected responsibilities are to be included in the response. Detail the proposed team's capacity to successfully plan, implement, and develop the proposed work.

2. Staff Qualifications

This section will provide the minimum qualifications including experience of the Offeror's staff assigned to the program. Describe the knowledge and experience of your proposed project director and/or staff including the day-to-day management. Attach resumes and relevant professional background/experience of each key staff position.

3. Supervision and Training

The Offeror will describe its ability to supervise, train and provide administrative direction relative to the delivery of the proposed services.

4. Organization Chart

If applicable, this section will reflect the position of each staff and line of responsibility/supervision. Please include position title, name and full or part-time status. If applicable, a project organization chart must be included with the proposal.

G. Technical Approach and Problem-Solving

1. Technical Scenario – Workflow Optimization and Dashboard Reporting

An OHA project team uses Monday.com to manage tasks, deadlines, dependencies, and follow-up activities across a project. The board includes automations for reminders and overdue tasks; however, the project manager has identified several challenges:

- a. Staff are receiving too many notifications and have started ignoring them;
- b. Overdue tasks are not being followed up on consistently;
- c. Tasks delayed because they are waiting on another person, decision, or activity are difficult to identify;
- d. The project manager is manually reviewing the board to determine which items need attention;
- e. Leadership needs better visibility into project health, including overdue work, upcoming critical deadlines, milestones, roadblocks, and risks; and
- f. The project manager wants to reduce manual follow-up and provide leadership with an easy-to-understand dashboard without creating unnecessary complexity for staff.

- g. Please describe how you would assess the current Monday.com environment and develop a practical solution. Walk us through your approach from initial assessment through implementation, testing, and knowledge transfer.
2. The Offeror's response should demonstrate how it would address the workflow and reporting challenges, including improving automation and follow-up processes, structuring the underlying data, and providing useful dashboard reporting for the project manager and leadership.
3. Please provide examples of the Monday.com features, automations, dashboards, widgets, or other native functionality you would consider using and explain why.
4. If you identify limitations with the existing approach or would recommend a different solution, please explain your recommendation and rationale.
5. The purpose of this scenario is to evaluate the Offeror's approach, technical knowledge, and problem-solving ability. A detailed system design or completed solution is not required.

H. Service Delivery

This section will include a detailed discussion of the following:

1. The Offeror's approach to applicable services, activities, and management requirements from Section 2, Item IV. Scope of Services including, but may not be limited to, phases, work plans for all service activities, and tasks to be completed, and related work assignments/responsibilities.
2. How the Offeror's approach is the most advantageous in terms of meeting the scope of work, cost effectiveness, and reliability.

I. Financial Capacity

This section will state the Offeror's status of current projects and the financial capacity. Given the state of the Offeror's current workload and work in progress, provide information as to the financial capacity to complete the project in a timely and orderly manner.

J. Price Proposal

This section will include a proposed cost for the contract period. Include a description of the basis for the cost of performing the requested services, including professional fees by labor category, other direct costs chargeable to the contract and general administration, overhead/profit, and reimbursable expenses.

(END OF SECTION)

Section 4 – Proposal Evaluation & Award

I. Proposal Evaluation

An RFP evaluation committee approved by the OHA's Procurement Officer or designee will evaluate all responsive and responsible proposals. The evaluation of such proposals will be based solely on the evaluation criteria set out in this RFP. The evaluation committee's primary responsibility will be to review the technical aspects of the proposal submitted. The price proposal review will be conducted by the evaluation committee chairperson. The review criteria will be as follows:

Evaluation Categories	Possible Points
1. Past Performance/Experience and Capability Up to 35 points will be awarded based on the degree to which the Offeror clearly and concisely demonstrates relevant professional Monday.com experience and capability, including the depth, relevance, and complexity of the Offeror's experience; experience on projects of similar scope; professional references; professional work samples; and past performance, including quality, reliability, responsiveness, and problem solving.	35 points
2. Personnel – Project Organization and Staffing Up to 15 points will be awarded based on the degree to which the Offeror clearly and concisely demonstrates that its proposed personnel have the qualifications, relevant Monday.com and Enterprise experience, technical expertise, training capability, and capacity to perform the requested services.	15 points
3. Technical Approach and Problem Solving Up to 25 points will be awarded based on the degree to which the Offeror clearly and concisely demonstrates its technical approach and problem-solving ability through its response to the Technical Scenario, including assessment of the existing environment, appropriate use of Monday.com functionality, workflow and automation improvements, dashboard and reporting solutions, testing, and knowledge transfer.	25 points

4. Service Delivery Up to 10 points will be awarded based on the degree to which the Offeror clearly and concisely demonstrates its approach to service delivery, including work planning, responsiveness, reliability, communication and coordination, quality assurance, issue resolution, and efficient and cost-effective use of authorized consulting hours.	10 points
5. Financial Capacity Up to 5 points will be awarded based on the degree to which the Offeror clearly and concisely demonstrates that it has sufficient financial and organizational capacity and available resources to complete the requested services in a timely and orderly manner.	5 points
6. Price Proposal Up to 10 points will be awarded for the Price Proposal. The Offeror proposing the lowest evaluated price will be assigned the maximum points. Points allocated to higher-priced proposals shall equal the lowest evaluated proposal price multiplied by the maximum points available for price, divided by the higher evaluated proposal price.	10 points
TOTAL POSSIBLE POINTS	100 Points

Each proposal will be classified initially as acceptable, potentially acceptable, or unacceptable. If numerous acceptable and potentially acceptable proposals are submitted, the evaluation committee may rank the proposals and limit the priority list to three (3) responsive and responsible Offerors who submitted the highest-ranked proposals. If there are less than three (3) acceptable or potentially acceptable proposals, the OHA will not be required to hold discussion with these Offerors who submitted unacceptable proposals.

II. Mandatory Requirements

The OHA will conduct an initial review to ensure that all proposals meet the minimum threshold requirements. Each proposal will be reviewed to ensure submittal of all required attachments, certifications, forms, and narrative sections.

Statements which indicate that mandatory certification will be submitted upon Contract award will be unacceptable.

III. Financial/Price Proposal Review

The financial/price proposal review will be evaluated for financial and contractual acceptability and reasonableness of the price proposal. The proposal with the lowest cost

factor will receive the highest available rating allocated to cost. Each proposal that has a higher cost factor than the lowest will be assigned a lower rating for cost.

The points allocated to higher priced proposals must be equal to the lowest proposal price multiplied by the maximum points available for price, divided by the higher proposal price as follows:

$$\frac{\text{Price of the lowest price proposal} \times 10 \text{ points}}{\text{Price of the proposal being rated}}$$

In accordance with HRS 103D-303, the Hawaii Offeror preference is applicable to this solicitation, for evaluation purposes only. Offerors desiring to qualify for the five per cent (5%) preference shall submit a completed Hawaii Bidder/Offeror Preference Certification Form SPO-081 with the proposal package. Hawaii Bidder/Offeror Preference Certifications submitted for previous or other solicitations will not be accepted. The Hawaii Offeror's proposal price shall be deemed reduced by 5% for evaluation purposes only. The award of the contract shall be at the original proposal price and not at the reduced evaluated price.

In determining whether a proposal is responsive, the OHA will evaluate the costs and supporting documentation against realistic operational expenses.

The OHA will also review the most recent audited financial statements of the Offeror.

IV. Technical Review

The Offeror's proposal will be in the form prescribed by this solicitation and will contain a response to each of the areas identified that affects the evaluation factors for an award.

- A. The technical proposal will be evaluated to determine if the Offeror possesses the capability to successfully perform the requirements of the solicitation.
- B. Proposals will be evaluated for technical and contractual acceptability. Proposals will be prepared in accordance with the instructions given in the RFP and will meet all requirements set forth in this RFP.
- C. All proposals will be reviewed for reasonableness. All Offerors whose offers are not within the competitive range will be notified that their proposals are unacceptable, negotiations and/or discussions with them are not contemplated, and any revisions to their proposals will not be considered.
- D. Award will be made to the responsible Offeror whose proposal conforms to the solicitation and will be most advantageous to the OHA considering price and other factors as indicated below.

Pursuant to section 3-122-59, HAR, if for a given request for proposal there is only one (1) responsive and responsible Offeror submitting an acceptable proposal, an award may be made to the single Offeror, or rejected, if conditions in section 3-122-59(a)(1) are not met, and new requests for proposal may be solicited or the procurement may be cancelled.

- E. The OHA reserves the right to award a Contract on the basis of the initial offers received without discussion. Offers are solicited on an “all or none” basis.

Failure to submit offers for all items and quantities listed will be cause for rejection. Proposals should be submitted initially on the most favorable terms from a price and technical standpoint, which the Offeror can submit to the OHA.

All proposals submitted will be evaluated on the basis of the evaluation criteria listed herein. Proposals will conform to all terms and conditions contained in the RFP. Proposals which do not conform to all requirements expressed in this solicitation may be rejected without further evaluation, deliberation, or discussion.

- F. Any notice of award letter(s), resulting from this solicitation shall be posted on the SPO website at <https://hiepro.hawaii.gov/> and the OHA website at <https://www.oha.org/solicitations/>.
- G. Past Performance. The OHA may evaluate the quality of each Offeror’s past performance. The assessment of an Offeror’s past performance will be used as one means of evaluating the credibility of the Offeror’s approach to work accomplishment. A record of marginal or unacceptable past performance may be an indication that the promises made by the Offeror are less than reliable. Such an indication will be reflected in the OHA’s overall assessment of the Offeror’s proposal. However, a record of acceptable or even excellent past performance will not result in a favorable assessment of an otherwise unacceptable technical proposal.

In investigating an Offeror’s past performance, the OHA may consider information in the Offeror’s proposal and information obtained from other sources, including past and present clients and their employees; other government agencies, including state and local agencies, consumer protection organizations and better business bureaus; former subcontractors; and others. Evaluation of past performance is a subjective assessment based on a consideration of all relevant facts and circumstances. The OHA may seek to determine whether the Offeror has consistently demonstrated a commitment to client satisfaction and timely delivery of quality goods and services at fair and reasonable prices.

The OHA’s conclusions about the overall quality of the Offeror’s past performance may be influential in determining the relative merits of the Offeror's proposal and in selecting the Offeror whose proposal is considered most advantageous to the OHA.

Past performance includes the Offeror's record of conforming to specifications and to standards of good workmanship; the Offeror's adherence to contract schedules, including the administrative aspects of performance, the Offeror's control of costs, including costs incurred for changes in the scope of services; the Offeror's reputation for reasonable and cooperative behavior and commitment to clients satisfaction; and, generally, the Offeror's business-like concern for the interests of the client.

V. Kūkākūkā (Discussions)

Discussions may be conducted with priority listed Offerors who submit proposals determined to be acceptable or potentially acceptable of being selected for award, but proposals may be accepted without discussion. The objective of these discussions is to: 1) promote understanding of the requirements set forth in the RFP and the Offeror's proposal; and 2) facilitate arriving at a contract that will provide the best value to the OHA, taking into consideration the evaluation factors set forth in this RFP. Any discussion is not intended to require an award of contract by the OHA.

(END OF SECTION)

Section 5 – Attachments

Attachment 1 – Proposal Submittal Checklist

Attachment 2 – Sample Cover Letter

Attachment 3 – Wage Certificate

Attachment 4 – Offer Form OF-1 and OF-2

Attachment 5 – OHA General Terms and Conditions

Attachment 6 – 2026-2027 Hawai‘i State Holidays

Attachment 7 – SPO-081 Hawaii Bidder/Offeror Preference Certification Form