



RELEASE DATE: April 6, 2018

**The State of Hawaii  
State Procurement Office**

**Request for Proposals  
Solicitation No. RFP-18-009-O**

**Procurement Training Development,  
Modification, and Delivery**

OFFERS ARE DUE AT 2:30 P.M., HAWAII STANDARD TIME (HST) ON

May 8, 2018

(or such later date as may be established by the State of Hawaii by an Addendum to this RFP)

BY SUBMISSION TO THE HAWAII STATE EPROCUREMENT SYSTEM (HiEPRO)

**DIRECT ALL QUESTIONS REGARDING THIS RFP, QUESTIONS OR ISSUES RELATING TO THE ACCESSIBILITY OF THIS RFP (INCLUDING THE ATTACHMENTS AND EXHIBITS AND ANY OTHER DOCUMENT RELATED TO THIS RFP) AND REQUESTS FOR ACCOMMODATIONS FOR PERSONS WITH DISABILITIES IN CONNECTION WITH THIS RFP, TO:**

OWEN KANO,  
EMAIL ADDRESS [owen.t.kano@hawaii.gov](mailto:owen.t.kano@hawaii.gov).

Mara Smith  
Procurement Officer

RFP-18-009-O

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## RFP Administrative Information

RFP Title:	Procurement Training Development, Modification, and Delivery
RFP Project Description:	See Section 1.2 Project Goal
RFP Lead:	Buyer Name – Owen Kano Agency Name – State Procurement Office Agency Address – 1151 Punchbowl Street, Room 416 City, State, Zip – Honolulu, HI 96813 Buyer email –owen.t.kano@hawaii.gov (See Section 1.6 Solicitation Number and Contract Administrator)
Submit proposals electronically via Hawaii Electronic Procurement System (HiePRO):	See Section 4.3 Electronic Submission of Proposals hiepro.ehawaii.gov
Deadline to Receive Questions:	April 16, 2018; 2:30 p.m. HST (See Sections 1.7 Schedule and Significant Dates and 2.5 Electronic Submission of Questions)
Question & Answers:	All questions, including those about Terms and Conditions, must be submitted on HiePRO. Questions must be submitted by the question deadline date and time. (Sections 1.7 Schedule and Significant Dates and 2.5 Electronic Submission of Questions)
RFP Closing Date and Time:	May 8, 2018 at 2:30 p.m. HST (See Section 1.7 Schedule and Significant Dates)
Initial Term of Contract and Renewals:	The initial term of the Contract will be one (1) year with the option for four (4) additional renewal periods of one (1) year each or parts thereof. (See Section 1.3 Period of Performance)
<p><b>TAKE NOTE OF THE MANDATORY .75% (.0075) TRANSACTION FEE TO HAWAII INFORMATION CONSORTIUM, LLC (HIC) BASED ON AWARD MADE IN HIEPRO. (DETAILED IN SECTION 2.3 ELECTRONIC PROCUREMENT AND SECTION 3.7 PAYMENT TO HAWAII INFORMATION CONSORTIUM, LLC.)</b></p>	

## Offer Checklist

Offeror must address ALL sections and attachments and provide the information and documentation as required in the table below.

No.	Description	Reference in RFP	Completed
1	Offer Checklist – submittal of checklist with all items checked “completed.”	Offer Checklist	
2	Offer Form OF-1 - Completed and signed  NOTE: Ensure that company name submitted in HlePRO matches company name on OF-1.	Attachment C Offer Form OF-1; Section 10.4 Proposal Preparation	
3	Table of Contents	Section 4.4 Required Format and Content #4 Table of Contents	
4	Executive Summary, not to exceed one (1) page	Section 4.4 Required Format and Content #5 Executive Summary	
5	Experience, not to exceed 3 pages	Section 6 Evaluation Criteria 1: Experience Submittal	
6	Technical, not to exceed 5 pages	Section 7 Evaluation Criteria 2: Technical Submittal	
7	Past Performance	Section 8 Evaluation Criteria 3: Client References; Attachment C-1, Offer Form OF-2	
8	Price	Section 9: Price Proposal Attachment C-2, Cost Proposal Form, Offer Form OF-3	
9	Confidential, Protected or Proprietary Information Section	Section 4.4, Item 7	

**REQUEST FOR PROPOSALS**  
**For Procurement Training Development,**  
**Modification, and Delivery**  
**Solicitation No. RFP-18-009-O**

## **Section 1: General Information**

### **1.1 Background**

The Hawaii State Procurement Office (SPO) provides procurement training statewide through an online, on-demand system. The training includes transcripts and training references/materials available on the SPO website at: <http://spo.hawaii.gov/for-state-county-personnel/training/>.

The SPO would like to have the existing training modules revised and updated with a revitalized, enthusiastic approach. The SPO would also like to expand the training topics list. by developing additional training modules. The updated and developed training shall engage the viewer and reinforce knowledge retention. Also, the training shall meet required ADA compliance.

In 2014, SPO began offering online, on-demand training modules which the SPO staff has managed and maintained. The SPO would like to continue to improve and expand its on-demand training program and would like to obtain services from a vendor knowledgeable and experienced in these training methods.

### **1.2 Project Goal**

The goal of this project is to ensure the State of Hawaii develops a proficient workforce of procurement professionals who expend public funds in a manner that is compliant with applicable statutes, rules, and policies. The objective of this project is to provide government purchasing staff clear, engaging procurement training courses that give them a solid foundation and help them work effectively and efficiently. The awarded contractor will research, modify existing training, and develop new training. The new and updated trainings will then be integrated into an existing learning management system.

### **1.3 Period of Performance**

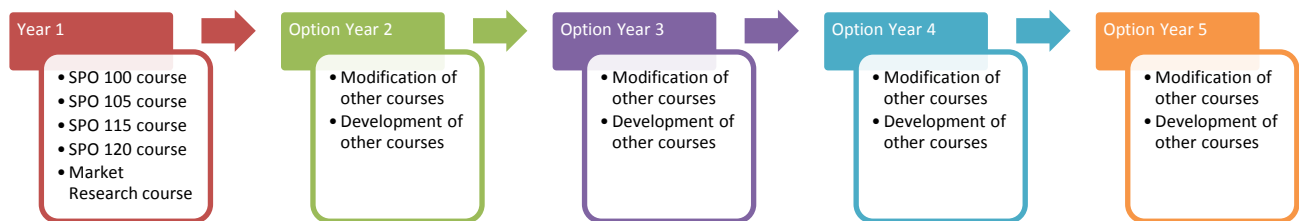
This contract has a base period of one (1) year plus four (4) optional, additional 12-month periods. Each additional 12-month period is subject to the availability of funds and the needs of the State as determined by SPO.

## 1.4 Contract Type

This is a Firm-Fixed-Price (FFP) contract based on price per course determined by total hours and average burdened labor rate. Basis of Estimate data (hours and average burdened labor rate) will be used for additional modified and new courses.

## 1.5 Proposed Timeline

This contract shall have one base year with up to four (4) one-year extensions and is designed to provide options on updating and developing additional procurement courses. The implementation may be broken into yearly deliverables as follows:



## 1.6 Solicitation Number and Contract Administrator

SPO is the issuing office for this solicitation including all subsequent addenda relating to it. The reference number is Solicitation No. RFP-18-009-O. This number must be referred to on all proposals, correspondence, and documentation relating to the RFP.

Owen Kano (see cover page), is the single point of contact during this procurement process. Offerors and interested persons shall direct to Owen Kano all questions concerning the procurement process, technical requirements of this RFP, contractual requirements, changes, clarifications, and protests, the award process, and any other questions that may arise related to this solicitation and the resulting contract. Upon execution of a contract the Contract Administrator is Jittima Laurita.

## 1.7 Schedule and Significant Dates

The table below contains the State's current estimate of the schedule and significant dates. All times are Hawaii Standard Time (HST). If a component of this schedule, such as "Proposals Due Date and Time" is delayed, the rest of the schedule may likely be shifted by the same number of days. Any change to the RFP Schedule and Significant Dates prior to the proposal due date shall be issued by addendum.

Event	Date
Solicitation Release:	April 6, 2018
Question Submittal Deadline:	April 16, 2018; 2:30 p.m.
Answers to Questions:	April 27, 2018; 2:30 p.m.
Proposal Due Date and Time:	May 8, 2018; 2:30 p.m.
Proposal Evaluations	May 31, 2018
Estimated Date for Discussions, if necessary	To be determined
Estimated Due Date for BAFO, if necessary	To be determined
Anticipated Award Date:	June 15, 2018
Contract Start Date	August 1, 2018

## 1.8 Definitions and Acronyms

See Attachment A- Definitions and Acronyms.

## **Section 2: Solicitation Information**

### **2.1 Governing Laws and Regulations**

This procurement is conducted by the State Procurement Office (SPO), in accordance with the Hawaii Public Procurement Code, Hawaii Revised Statutes (HRS), Chapter 103D. Information about SPO and its governing laws are available at <http://spo.hawaii.gov/> select References.

### **2.2 Overview of State of Hawaii Procurement Process**

- 2.2.1** The RFP is issued pursuant to Subchapter 6 of HAR chapter 3-122, implementing HRS §103D-303 on competitive sealed proposals.
- 2.2.2** The RFP will be issued through HlePRO, the state eProcurement system. Refer to section 2.3. Written questions and responses regarding the RFP are submitted through HlePRO. Changes to the RFP are issued by Addendum through HlePRO.
- 2.2.3** Proposals shall be submitted and received through HlePRO. Offeror's proposal shall be open to the public after posting of award, except for portions of the proposal that the Offeror has labeled confidential and/or proprietary pursuant to HAR §3-122-58.
- 2.2.4** An evaluation committee approved by the Procurement Officer, shall evaluate the proposals in accordance with evaluation criteria within Sections 5 through 9.
- 2.2.5** Proposals may be accepted upon evaluation without discussion. If deemed necessary, prior to entering into discussions, a "priority list" of responsible Offerors submitting acceptable and potentially acceptable proposals shall be generated. The priority list may be limited to a minimum of three (3) responsible Offerors who submitted the highest-ranked proposals. The objective of these discussions is to clarify issues regarding the Offeror's proposal before a request for Best and Final Offer (BAFO) is tendered.
- 2.2.6** If the State determines a BAFO is necessary, it shall request one from the Priority-Listed Offeror(s). BAFO Shall be issued in an addendum on HlePRO. The Offeror shall submit their BAFO through HlePRO.
- 2.2.7** If during discussions there is a need for any substantial clarification or change in the RFP, the RFP shall be amended by an addendum to incorporate such clarification or change. Addenda to the RFP shall be distributed only to priority-listed offerors.



- 2.2.8** The date and time for Offerors to submit their BAFO, if any, is indicated in Section 1.7 Schedule and Significant Dates. If an Offeror does not submit a notice of withdrawal or a BAFO, the Offeror's immediate previous bid shall be construed as its BAFO.
- 2.2.9** After receipt and evaluation of the BAFOs in accordance with evaluation criteria in Sections 5 through 9, the evaluation committee may have additional discussions after receiving approval by the CPO to conduct a second BAFO. Award(s), if any shall be made to the Offeror(s) whose proposal is determined to be the most advantageous to the State taking into consideration the evaluation factors set forth in the RFP, including price.
- 2.2.10** The contents of any proposal shall not be disclosed during the review, evaluation, or discussion process. Once the notice of award(s) is made, all proposals, successful and unsuccessful, become available for public inspection. Those sections that the Offeror and the State agree are confidential and/or proprietary shall be identified by the Offerors and if agreed by the State shall be excluded from public access.

If a person is denied access to a State procurement record, the person may appeal the denial to the office of information practices in accordance with HRS §92F-42(12).

- 2.2.11** The RFP, any addenda issued, and the successful Offerors' proposal shall become a part of the contract. All proposals shall become the property of the State of Hawaii.

## **2.3 Electronic Procurement**

- 2.3.1** The State has established the Hawaii State eProcurement (HlePRO) System to promote an open and transparent system for vendors to compete for state contracts electronically. Offerors interested in responding to this solicitation must be registered on HlePRO. Registration information is available at the State Procurement Office (SPO) website: <http://spo.hawaii.gov/HlePRO/>, then select HlePRO Vendor Registration Guide.
- 2.3.2** The State will use HlePRO to issue the RFP, receive Offers, issue Addenda and award the RFP. Addenda and the other information and materials shall be provided by the State on HlePRO, including additions or changes with respect to the dates in Section 1.7 Schedule and Significant Dates. The State shall not be responsible for any person's or

entity's failure to do so for any reason. The State is not responsible for any delay or failure of any Offeror to receive any materials updated through the RFP Process on a timely basis.

**2.3.3** As part of this procurement process, Offerors are informed that awards made for this solicitation, if any, shall be done through the HlePRO and shall therefore be subject to a mandatory .75% (.0075) transaction fee, not to exceed \$5,000 for the initial contract term. This transaction fee shall be based on the initial awarded dollar amount in HlePRO, payable to Hawaii Information Consortium, LLC (HIC), the vendor administering HlePRO. Refer to the Section 3.7 Payment to Hawaii Information Consortium, LLC (HIC).

**2.3.4** HlePRO Special Instructions. Offeror shall review all special instructions located in HlePRO. Offerors are responsible for ensuring that all necessary files are attached to their offer prior to the proposal deadline.

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

**Offerors shall enter the final total sum price as listed on OF-3 Cost Proposal Form as the Unit Price in US Dollars and Cents when submitting their offer in HlePRO.**

## **2.4 RFP Addenda**

Formal changes to this RFP including but not limited to contractual terms and procurement requirements shall only be changed via formal written addenda issued by the State.

The State accepts no responsibility for a prospective Offeror not receiving solicitation documents and/or revisions to the solicitation. It is the responsibility of the prospective Offeror to monitor the Hawaii State eProcurement System (HlePRO) to obtain RFP addenda or other information relating to the RFP.

## **2.5 Electronic Submission of Questions**

Questions must be submitted through Hawaii State eProcurement System (HlePRO) by the question deadline date and time shown in Section 1.7 Schedule and Significant Dates. Each question shall identify the page, section number, paragraph, and line or sentence of such provision(s) of the RFP to which the question applies. Answers will be given via the Hawaii State eProcurement System (HlePRO) site as noted in Section 1.7 Schedule and Significant Dates.

Offerors are cautioned about including context in questions that may reveal the identity of the potential Offeror. The identity of potential Offerors will not be published with the answers, but the text of questions will be restated, to the extent possible, to exclude information identifying potential Offerors.

The State may refuse to answer any questions received after the Question/Answer deadline.

## **2.6 Proposal Due Date**

Proposals must be received on HlePRO by the posted closing date and time as described in Section 1.7 Schedule and Significant Dates of this RFP. Upon the submittal deadline, Offerors will be unable to submit proposals on HlePRO. Proposals received after the deadline and/or through sources other than HlePRO will be rejected.

## **2.7 Cancellation of Procurement**

This RFP may be canceled at any time prior to execution of a contract if the State determines such action to be in the best interests of the State.

## **2.8 Firm Offers**

Responses to this RFP, including proposed costs, will be considered firm for one hundred and eighty (180) days after the proposal due date.

## **2.9 Ownership or Disposition of Proposals and other Materials Submitted**

All costs incurred by the Offeror in preparing or submitting a proposal shall be the Offeror's sole responsibility regardless of whether any award results from this RFP. The State shall not reimburse such costs. All proposals become the property of the State of Hawaii.

## **2.10 Additional Information**

The Offeror shall provide additional information regarding aspects of an Offeror's Proposal within five (5) business days of the State's request, unless the State specifies another period. As noted, each Offeror shall submit only one Proposal. If an Offeror submits more than one Proposal, then the State shall reject all Offeror's proposals pursuant to HAR 3-122-4.

## **Section 3: Requirements**

### **3.1 Mandatory Minimum Administrative Proposal Requirements**

This section contains the minimum requirements that must be met to be considered for the evaluation phase. All items described in this section are non-negotiable. All Offerors must state willingness and demonstrate ability to satisfy these requirements in the proposal submitted for consideration.

### **3.2 Minimum Requirements and Qualifications**

Offeror shall provide all services as described in the Scope of Work (see Attachment B). Offeror shall have been in business and have provided all services for at least three (3) consecutive years, or alternatively, key personnel may submit their resume supporting three consecutive years of experience.

### **3.3 Insurance**

To be eligible for award, the Offeror agrees to acquire insurance from an insurance carrier or carriers licensed to conduct business in Hawaii. See also Special Provisions 10.12 Liability Insurance that awarded Offeror(s) shall be required to submit to execute a formal contract with the State.

### **3.4 State Terms and Conditions**

Refer to Section 10 Special Provisions, Exhibit 1 General Provisions, and Exhibit 2 AG General Conditions for the State Special Terms and Conditions that apply to this solicitation. Offeror shall indicate in their Proposal, through Offer Form OF-1, Attachment C, that they have read and understand the requirements shown in State Terms and Conditions.

### **3.5 Subcontractors**

#### **3.5.1 Contractor Responsibility for Subcontractors**

Should a contractor utilize subcontractors, the contractor shall ensure the subcontractors providing services shall meet the same service requirements and provide the same quality of service required of the prime contractor and in a timely manner. The contractor with whom the State has contracted shall be known as the prime contractor. No subcontract or subcontractor shall relieve the prime contractor of its responsibilities for the services to be provided. The prime contractor shall manage the quality and performance, project management and schedules and timely start

and completion of services performed by each of its subcontractors. The prime contractor shall be solely responsible and accountable for the completion of all services it has subcontracted.

### **3.5.2 Additional Contractor Requirements**

Each Contractor shall:

Provide all labor, materials and equipment necessary to meet the RFP Requirements;

Communicate contract requirements to its Subcontractors' personnel and direct and coordinate project activities to ensure that the services progress efficiently and are completed on schedule;

Ensure that all its and its Subcontractors' employees can communicate effectively with State employees;

Ensure that it is current with all payments and registration fees and similar financial obligations owed to the State, including taxes and other administrative fees, during the term of its Contract with the State;

Fully cooperate and maintain effective communication with the State and cooperate in the resolution of problems, suspected problems, or potential problems.

## **3.6 Payment**

Payments shall be made to the awarded Contractor in accordance with successful completion of training course set forth in Attachment B Scope of Work. Payment will not be made until an approved schedule of training course is submitted and accepted. Pursuant to HRS §103-10, the State shall have thirty (30) calendar days after receipt of invoice or satisfactory completion of projects to make payment. For this reason, the State will reject any offer submitted with a condition requiring payment within a shorter period. Further, the State will reject any offer submitted with a condition requiring interest payments greater than that allowed by HRS §103-10, as amended.

The State will not recognize any requirement established by the Contractor and communicated to the State after award of the contract, which requires payment within a shorter period or interest payment not in conformance with statute.

### **3.7 Payment to Hawaii Information Consortium, LLC (HIC)**

HlePRO is administered by Hawaii Information Consortium, LLC (HIC). HIC shall invoice the Contractor(s) directly for payment of transaction fees. Payment must be made to HIC within thirty (30) days from receipt of invoice. HIC is an intended third-party beneficiary of transaction fees, which are used to fund the operation, maintenance and future enhancements of the HlePRO system.

### **3.8 Contractor Mid-Training Course Review Meetings**

Contractors are required to participate in a “Contractor’s Performance Review Meeting” with the State. The purpose of the meeting is to discuss the contract, the services provided, and best practices. Contractor performance meetings shall be held throughout progression of each training course as indicated in Attachment B Scope of Work.

### **3.9 Termination for Non-Performance or Convenience**

Refer to Exhibit 2, AG General Conditions, AG-008.

### **3.10 Travel**

Travel expenses are shall not be generally authorized for this contract unless specifically allowed in writing prior to travel by the procurement officer. Communication shall generally be conducted electronically and/or by teleconference. Should travel become necessary later in the contract, this shall be qualified according to our State Per Diem policy and negotiated at the time.

### **3.11 Quality Control**

The Contractor shall provide quality services/products and management oversight of all processes. The Contractor shall provide accurate data/reports and meet deliverables, with emphasis on overall success and positive impact to the training courses and modules. The Contractor shall provide for the management, support, and supervision of qualified personnel to accomplish the objectives of this contract.

## Section 4: Instructions to Offerors – Proposal Submission

### 4.1 Proposal Structure and Labeling

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

### 4.2 Proposal Submission Instructions

Proposals must be received by 2:30 p.m. on May 8, 2018 through the Hawaii Electronic Procurement System (HlePRO). Hard copies will not be accepted.

### 4.3 Electronic Submission of Proposals

Proposals shall be submitted and received electronically through HlePRO by the date and time listed in Section 1.7 Schedule and Significant Dates. This electronically submitted offer shall be considered the original. Any offers received outside of the HlePRO, including faxed or e-mailed bids, shall not be accepted or considered for award. Any offer received after the due date and time shall be rejected. (See Section 2.3 Electronic Procurement for further information.) **The maximum file size that HlePRO can accept is 100MB. Files larger than 100MB must be reduced into two or more files.**

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

### 4.4 Required Format and Content

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

1. **Offer Checklist.** Complete and submit all items noted on the Offer Checklist.
2. **Offer Form, OF-1.** Offeror shall complete and sign OF-1 Offer Form. See Special Provisions 10.4 Proposal Preparation.
3. **Client References. Attachment C-1, OF-2 References.**
4. **Table of Contents.** A Table of Contents must be included with each proposal. All major parts of the proposal shall be identified by referencing page number.
5. **Executive Summary.** The executive summary [not to exceed one (1) page] shall

briefly describe the Offeror's Proposal. This summary should highlight the major features of the Proposal and should demonstrate the Offeror's understanding of and ability to meet the Administrative and Technical Requirements of the RFP.

**6. Evaluation Criteria Submittals (Refer to Sections 5 through 9).**

This section shall be sub-divided by the evaluation criteria and include the narrative and any other requirements.

- a. Experience – See Section 6. Submittal, limited to three (3) pages (page requirement is in addition to resumes and samples).
  - b. Technical – See Section 7. Submittal, limited to five (5) pages.
  - c. Past Performance – See Section 8. Submittal, limited to two (2) pages
  - d. Price Proposal. See Section 9. Offeror shall complete the attached Cost Proposal Form, OF-3 (Attachment C-2), in which Offeror shall submit all price line items to include all applicable taxes.
- 7. Confidential, Protected or Proprietary Information.** All confidential, protected or proprietary information must be included in a separate section of the proposal. Do not incorporate protected information throughout the Proposal. Rather, provide a reference in the proposal directing the Evaluation Committee to this protected Information section. If Offeror believes that any portion of its proposal, offer, specification, protest, or correspondence contains information that should be withheld as confidential, then the Procurement Officer should be so advised in writing and shall be furnished with justification for confidential status. Price is not considered confidential and shall not be withheld.

Information included in the Confidential, Protected or Proprietary Information section of an Offeror's proposal is not automatically accepted as protected. All information identified in the section will be subject to review by the State in accordance with the procedures prescribed by the State's open records statute, freedom of information act, or similar law.



## **Section 5: Evaluation and Award**

### **5.1 Evaluation of Proposals**

The Procurement Officer of the State of Hawaii State Procurement Office (SPO), or an evaluation committee of at least three (3) qualified State employees selected by the (SPO) Procurement Officer, shall evaluate proposals for the base Master contract. The evaluation will be based solely on Section 5.7 Evaluation Criteria and the process described in this section.

### **5.2 Initial Review and Award without Discussions**

In the initial phase of the evaluation process, the State will review all proposals in a timely received.

The State reserves the right to award on receipt of proposals without discussion. Offerors are encouraged to submit their most favorable proposal up to the date and time established for proposal submittal.

### **5.3 Discussion with Priority Listed Offerors**

It is the SPO's intent to award a contract without discussions. However, SPO reserves the right to enter into discussions, as indicated below, if needed.

Prior to holding any discussions, a priority list shall be generated consisting of proposals determined to be acceptable or potentially acceptable.

If numerous acceptable and potentially acceptable proposals are submitted, the evaluation committee may limit the priority list to the three (3) highest ranked, responsible Offerors.

The State may conduct discussions with priority listed Offerors to clarify issues regarding the proposals before requesting Best and Final Offers, if necessary.

In conducting discussions, there shall be no disclosure of any information derived from proposals submitted by competing Offerors.

## 5.4 Best and Final Offers

If deemed appropriate, the State may issue a request for a Best and Final Offer (BAFO). The request shall be issued via an Addendum, which will provide guidance and additional instructions. Both the request and the Offeror's BAFOs shall be submitted on HlePRO by the BAFO submittal deadline. If an Offeror fails to do so, its last submitted Offer shall be deemed its BAFO.

The BAFOs will be evaluated by the Evaluation Committee taking into consideration the Evaluation Criteria set forth in Section 5.7 Evaluation Criteria.

## 5.5 Award of Contract

Award shall be made to the responsible Offeror whose proposal is determined the most advantageous and deemed the best value for the State of Hawaii, taking into consideration the evaluation factors set forth in this request for proposals.

## 5.6 Responsibility of Offeror

Pursuant to HRS §103D-310(c), the selected offeror shall at the time of award be compliant with all laws governing entities doing business in the State of Hawaii. See Special Provisions 9.2 Responsibility of Offerors.

## 5.7 Evaluation Criteria

The following criteria shall be used in evaluating the Offerors:

**Table 1 - Evaluation Criteria**

<b>Evaluation Category</b>	<b>Evaluation Subcategory</b>	<b>Points Possible</b>
<b>Evaluation Criteria 1: Experience</b>	<b>Experience Submittal (Max 3 Pages) in addition to resumes of key personnel and project samples;</b>	<b>30</b>
<b>Evaluation Criteria 2: Technical</b>	<b>Technical Submittal (Max 5 Pages)</b>	<b>30</b>
<b>Evaluation Criteria 3: Past Performance</b>	<b>Client References</b>	<b>10</b>
<b>Evaluation Criteria 4: Price</b>	<b>Price Proposal</b>	<b>30</b>
<b>Total Possible Points</b>		<b>100</b>

Price will be scored based on the points to conversion as explained in Section 9 Evaluation Criteria 4: Price Proposal.

## **5.8 Notice of Award**

After a final selection is made, the State will issue a notice of award on its electronic procurement system (HlePRO). Upon award, proposal files are public records and available for review by submitting Request for Access to Government Record. Information on the Office of Information Practices and forms may be found at: <http://oip.hawaii.gov>.

## **5.9 Debriefing**

Pursuant to HAR §3-122-60, a non-selected Offeror may request a debriefing to understand the source selection decision and contract award.

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

A protest by the requestor following a debriefing, shall be filed within five (5) working days, as specified in HAR §103D-303(h). See Special Provisions Section 10.9 Protest Procedures for submitting a protest.

## **Section 6: Evaluation Criteria 1: Experience Submittal**

### **6.1 Experience Submittal**

This section contains requirements pertaining to the offeror's experience relating to this RFP. Offeror shall explain their management plan(s) implemented to show how they met or exceeded the requirements of previous work, project examples, and past reporting plan. The submittal shall not exceed a maximum of three (3) pages in addition to the resumes of key personnel, project samples, and shall be submitted in Arial font size 12.

At a minimum, submittal shall include project examples that describe: scope of work, number of key employees assigned, significant milestones achieved, and duration of time from start to completion.

### **6.2 Scope of Work**

The Experience submittal shall explain how Offeror meets or exceeds the requirements of each section of Attachment B Scope of Work. The Offeror must explain its prior experience providing the types of services requested by this RFP. Describe at least three major efforts you worked on during the past five (5) years, on same or similar projects. Explain the scope of work, beginning and completion date, number of employees assigned to the project, and significant milestones that were completed.

## **Section 7: Evaluation Criteria 2: Technical Submittal**

### **7.1 Technical Submittal**

This section contains requirements pertaining to the offeror's technical offering. Offeror shall explain the Offeror's plan for the project goal and requirements, amount of key personnel allocated, the methodology toward implementing and tracking the success of deliverables including milestones. The submittal shall not exceed a maximum of five (5) pages and shall be submitted in Arial font size 12.

At a minimum, include methodologies to achieve completion of training courses, tracking of deliverables, and a mitigation plan.

### **7.2 Scope of Work**

The Technical Submittal shall explain the Offeror's management plan to meet or exceed the requirements of each section of Attachment B Scope of Work. The Offeror must list its technological knowledge as it relates to the types of services requested by this RFP. Describe at least three major tools you have worked with during the past five (5) years, on same or similar projects.

## **Section 8: Evaluation Criteria 3: Client References (Past Performance)**

Offeror shall complete Offer Form OF-2 Client References, Attachment C-1 with the names and contact information of customer references for at least three (3) clients that received services that are similar to those in the scope of work.

The State reserves the right to conduct reference checks beyond what was provided by references.

The results of the reference checks will be reflected in the evaluation score for this criterion. Full points will not be awarded without confirmation of services from at least three (3) listed customers. Offerors are encouraged to notify references with due notice.

## **Section 9: Evaluation Criteria 4: Price Proposal**

### **9.1 Price Evaluation**

The Offeror's price proposal is worth 30% of the total points, which is 30. Offerors shall enter the total sum price for the four (4) year services as the Unit Price in US Dollars and Cents when submitting their offer in HlePRO. Prices shall be evaluated for competitiveness and reasonableness of price. The State may use any or all price analysis techniques and procedures to determine price reasonableness.

### **9.2 Cost Points Conversion**

In converting cost to points, the Lowest Total Cost will automatically receive the maximum number of points allocated to cost shown in Table 1 in Section 5.7. The point allocations for cost on the other Offers for each service category will be determined through the method set out in the following formula:  $[\text{Lowest Total Cost multiplied by maximum points} \div \text{Offeror's Proposed Cost}] = \text{Cost Points Awarded}$ .

### **9.3 Price and Rate Guarantee Period**

All prices shall be guaranteed for each course as part of this Agreement. Requests for price adjustment shall not be considered.

## **Section 10: Special Provisions**

### **10.1 Scope**

The Offer shall be in accordance with this RFP solicitation, including the Special Provisions in this section, the Scope of Work specified herein, the SPO General Provisions, dated 7/2017 or as amended, and the Attorney General (AG) General Conditions, AG-008 or as amended.

### **10.2 Responsibility of Offerors**

The Offeror is advised that in order to be awarded a contract under this solicitation, the Offeror will be required, to be compliant with all laws governing entities doing business in the State including the following chapters and pursuant to Hawaii Revised Statutes HRS §103D-310(c):

1. Chapter 237, General Excise Tax Law;
2. Chapter 383, Hawaii Employment Security Law;
3. Chapter 386, Worker's Compensation Law;
4. Chapter 392, Temporary Disability Insurance;
5. Chapter 393, Prepaid Health Care Act; and
6. §103D-310(c), Certificate of Good Standing (COGS) for entities doing business in the State.

#### **10.2.1 Vendor Compliance - Hawaii Compliance Express (HCE)**

Vendors may use the HCE, which is an electronic system that allows vendors/Contractors/service providers doing business with the State to quickly and easily demonstrate compliance with applicable laws. It is an online system that replaces the necessity of obtaining paper compliance certificates from the Department of Taxation, Federal Internal Revenue Service; Department of Labor and Industrial Relations, and Department of Commerce and Consumer Affairs.

#### **10.2.2 Timely Registration on HCE**

Vendors/Contractors/service providers intending to use the HCE to demonstrate compliance are advised to register on HCE as soon as possible at <https://vendors.ehawaii.gov>. The annual registration fee is \$12.00 and the 'Certificate of Vendor Compliance' is accepted for the execution of a contract and final payment. If a vendor/Contractor/service provider is not compliant on HCE at the time of award, the Offeror will not receive the award.



### **10.2.3 Verification of Compliance on the HCE**

Prior to awarding this contract, the State shall verify compliance of the Contractor(s). The State will not verify compliance via the HCE throughout the term of the contract. Purchasing agencies are not required to verify compliance prior to issuing a contract, purchase order, or pCard payment, when utilizing the resulting SPO Price List Contract.

### **10.2.4 Vendor Compliance - Paper Documents**

Vendors not utilizing the HCE to demonstrate compliance shall provide the paper certificates to the State as instructed below. All certificates must be valid on the date it is received by the SPO. Timely applications for all applicable clearances are the responsibility of the Offeror.

### **10.2.5 HRS Chapter 237 tax clearance requirement for award**

Pursuant to Section 103D-328, HRS, the Contractor shall be required to submit a tax clearance certificate issued by the Hawaii State Department of Taxation (DOTAX) and the Internal Revenue Service (IRS). The certificate shall have an original green certified copy stamp and shall be valid for six (6) months from the most recent approval stamp date on the certificate.

The *Tax Clearance Application*, Form A-6, and its completion and filing instructions, are available on the DOTAX website:

<http://tax.hawaii.gov/forms/>.

### **10.2.6 HRS Chapters 383 (Unemployment Insurance), 386 (Workers' Compensation), 392 (Temporary Disability Insurance), and 393 (Prepaid Health Care) requirements for award**

Pursuant to Section 103D-310(c), HRS, the Contractor shall be required to submit a certificate of compliance issued by the Hawaii State Department of Labor and Industrial Relations (DLIR). The certificate is valid for six (6) months from the date of issue. A photocopy of the certificate is acceptable to the SPO.

The *DLIR Form LIR#27 Application for Certificate of Compliance with Section 3-122-112, HAR*, and its filing instructions are available on the DLIR website: <http://labor.hawaii.gov/forms/>.

### **10.2.7 Compliance with Section 103D-310(c), HRS, for an entity doing business in the State**

The Contractor shall be required to submit a *Certificate of Good Standing*

(COGS) issued by the State of Hawaii Department of Commerce and Consumer Affairs (DCCA) - Business Registration Division (BREG). The Certificate is valid for six (6) months from date of issue. A photocopy of the certificate is acceptable to the SPO.

To obtain the certificate, the Contractor must be registered with the BREG. A sole proprietorship is not required to register with the BREG and is therefore not required to submit the certificate.

For more information regarding online business registration and the COGS is available at <http://cca.hawaii.gov/breg/>.

### **10.2.8 Timely Registration**

The above certificates should be applied for and submitted to the State as soon as possible. If a valid certificate is not submitted on a timely basis for award of a contract, an Offeror otherwise responsive, may not receive the award.

### **10.2.9 Verification of Compliance**

Upon receipt of compliance documents (A-6, LIR#27, COGS), the State reserves the right to verify their validity with the respective issuing agency. The Contractor shall maintain their compliance throughout the term of the contract.

## **10.3 Required Review**

Before submitting a proposal, each Offeror must thoroughly and carefully examine this RFP, any attachment, addendum, and any other relevant document, to ensure Offeror understands the requirements of the RFP. Offeror must also become familiar with State, local and Federal laws, statutes, ordinances, rules, and regulations that may in any manner affect cost, progress, or performance of the work required.

Should Offeror find defects and questionable or objectionable items in the RFP, Offeror shall notify the State in writing prior to the deadline for written questions as stated in the Section 1.7 Schedule and Significant Dates, as amended. This will allow the issuance of any necessary corrections and/or amendments to the RFP by addendum, and mitigate reliance on a defective solicitation and exposure of proposal(s) upon which award could not be made.

## **10.4 Proposal Preparation**

### **10.4.1 Offer Form OF-1, Attachment C**

Offer Form OF-1, Attachment C is required to be completed using Offeror's exact legal name as registered with the Department of Commerce and Consumer Affairs, if applicable, in the appropriate space on OFFER FORM OF-1, Attachment C.

The Offeror's authorized signature on the OFFER FORM OF-1, Attachment C shall be an original signature in ink, which shall be required before an award, if any, can be made. The submission of the proposal shall indicate Offeror's intent to be bound.

Completion of Offer Form OF-1, Attachment C is Offeror's acknowledgement and agreement to provide services in all categories identified in the RFP and its understanding of evaluation criteria and process.

### **10.4.2 Offer Guaranty**

An offer guaranty is NOT required for this RFP.

### **10.4.3 Tax Liability**

Work to be performed under this solicitation is a business activity taxable under HRS Chapter 237, and if applicable, taxable under HRS Chapter 238. Offerors are advised that they are liable for the Hawaii GET at the current 4.5% for sales made on Oahu, and at the 4% rate for the islands of Hawaii, Maui, Molokai, and Kauai. If, however, an Offeror is a person exempt by the HRS from paying the GET and, therefore, not liable for the taxes on this solicitation, the Offeror shall state its tax-exempt status and cite the HRS chapter or section allowing the exemption.

### **10.4.4 Federal I.D. No. and Hawaii General Excise Tax License I.D**

Offeror shall submit its current Federal I.D. No. and Hawaii General Excise Tax License I.D. number in the space provided on OFFER FORM OF-1, Attachment C thereby attesting that the Offeror is doing business in the State and that Offeror will pay such taxes on all sales made to the State.

## **10.5 Confidentiality**

**10.5.1** If an Offeror in good faith considers a portion of an Offer, or correspondence with the State, to contain confidential information, it shall follow the procedures set forth in Section 4.4 #7. Costs included or

required to be included in an Offer cannot be confidential and will not be withheld from public access.

- 10.5.2** Any Offeror may request the nondisclosure of designated trade secrets or other proprietary data it considers confidential. Such request shall be in writing specifically identifying the information or material asserted to be confidential and the justification for confidential treatment. The request shall be submitted with the submission of the Offer. The information or material asserted by the Offeror to be confidential to the Offeror shall be clearly marked and be submitted in or with the Offer in such manner as to be readily separable from the Offer (or remaining portion of the Offer) to facilitate public access to and inspection of the non-confidential portion of the Offer. Total Cost proposals cannot be marked confidential.
- 10.5.3** Pursuant to HAR §3-122-58, the State will consult with the Attorney General regarding an Offeror's request for confidentiality of part of its Offer. The Attorney General shall determine what portions of the request are confidential under Law and what portions are not, in accordance with HRS Chapter 92F. The State shall communicate the Attorney General's determination to the Offeror in writing. If the request for confidentiality is denied in whole or in part, the information or material deemed to be non-confidential shall be made available as public information unless the Offeror appeals pursuant to HRS § 92F-42(1).

## **10.6 Redaction by the State**

If the State determines, pursuant to HRS §92F-13, that any information or material in an Offer, any written question or submission by a Prospective Offeror, an Offeror or a Contractor, any response to any question or submission from a Prospective Offeror, Offeror or Contractor, and/or any Contract document is not required to be disclosed, then the State shall segregate, or redact, or otherwise cause any such information or material to not be made available as public information.

## **10.7 Proposal Objectives**

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

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

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

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

### **10.8 Each Offeror to Bear its Own Costs**

Each Offeror shall be responsible for all costs incurred by it prior to the Notice of Award, including, without limitation, its costs of preparing and submitting its Offer, responding to notices or requests, making Priority-Listed Offeror presentations, demonstrations and discussions, and otherwise participating in the RFP Process.

### **10.9 Protest Procedures**

Pursuant to HRS §103D-701 and HAR §3-126-3, an actual or prospective Offeror who is aggrieved in connection with the solicitation or award of a contract may submit a protest. Any protest shall be submitted in writing to the Procurement Officer at:

Procurement Officer  
State Procurement Office  
1151 Punchbowl Street, Room 416  
Honolulu, HI 96813

A protest shall be submitted in writing 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 shall be submitted in writing prior to the date set for receipt of offers. Further provided that a protest of an award or proposed award shall be submitted within five (5) working days after the posting of award or if requested, within five (5) working days after the Procurement Officer's debriefing was completed.

The notice of award, if any, resulting from this solicitation shall be posted on the State of Hawaii electronic procurement site.

### **10.10 Notice to Proceed**

Work will commence on the official commencement date specified on the Notice to Proceed.

### **10.11 Contract Execution**

The successful Offeror receiving award shall enter into a formal written contract to be signed by the Contractor and returned within ten (10) days working.

No performance or payment bond is required for this contract.

No work is to be undertaken by the Contractor prior to the commencement date specified on the Notice to Proceed. The State of Hawaii is not liable for any work, contract, costs, expenses, loss of profits, or any damages whatsoever incurred by the Contractor prior to the official starting date.

If an option to extend is mutually agreed upon, the Contractor shall be required to execute a supplemental contract for the additional extension period.

## 10.12 Liability Insurance

The Contractor shall maintain in full force and effect during the life of this contract, liability and property damage insurance to protect the Contractor and his Subcontractors, if any, from claims for damages for personal injury, accidental death and property damage which may arise from operations under this contract, whether such operations be by the Contractor or by Subcontractor or anyone directly or indirectly employed by either of them. If any Subcontractor is involved, the insurance policy or policies shall name the Subcontractor as additional insured.

As an alternative to the Contractor providing insurance to cover operations performed by a Subcontractor and naming the Subcontractor as additional insured, the Contractor may require the Subcontractor to provide its own insurance, which meets the requirements herein. It is understood that a Subcontractor's insurance policy or policies are in addition to the Contractor's own policy or policies.

The following minimum insurance coverage(s) and limit(s) shall be provided by the Contractor, including its Subcontractor(s) where appropriate.

<u>Coverage</u>	<u>Limits</u>
Commercial General Liability (occurrence form)	\$1,000,000 per occurrence \$2,000,000 aggregate
Automobile Liability	\$1,000,000 per accident

Each insurance policy required by this contract (with the exception of the Professional Liability policy), including a Subcontractor's policy, shall contain the following clauses:

- A. "The State of Hawaii is added as an additional insured as respects to operations performed for the State of Hawaii."
- B. "It is agreed that any insurance maintained by the State of Hawaii will apply in excess of, and not contribute with, insurance provided by this policy."

A Waiver of Subrogation shall apply to the General Liability, Automobile Liability and Worker's Compensation insurance policies and shall be in favor of the State of Hawaii.

Prior to award, the Contractor agrees to deposit with the State of Hawaii certificate(s) of insurance necessary to satisfy the State that the insurance provisions of this RFP have been complied with and to keep such insurance in effect and the certificate(s) therefore on deposit with the State during the entire term of the price list and price list extensions, if any, including those of its Subcontractor(s), where appropriate. Upon request by the State, Contractor shall be responsible for furnishing a copy of the policy or policies.

Failure of the Contractor to provide and keep in force such insurance shall be regarded as material default, entitling the State to exercise any or all of the remedies provided in the contract and this RFP for a default by the Contractor.

The procuring of such required insurance shall not be construed to limit the Contractor's liability hereunder nor to fulfill the indemnification provisions and requirements of this RFP. Notwithstanding said policy or policies of insurance, the Contractor shall be obliged for the full and total amount of any damage, injury, or loss caused by negligence or neglect connected with this price list.

### **10.13 Contract Invalidation**

If any provision of this contract is found to be invalid, such invalidation will not be construed to invalidate the entire contract.

### **10.14 Mistakes in Proposals**

**10.14.1** Mistakes shall not be corrected after award of contract.

**10.14.2** When the Procurement Officer knows or has reason to conclude before award that a mistake has been made, the Procurement Officer may request the offeror to confirm the proposal. If the Offeror alleges mistake, the proposal may be corrected or withdrawn pursuant to this section.

**10.14.3** If discussions are not held, or if the best and final offers upon which award will be made have been received, mistakes shall be corrected to the intended correct offer whenever the mistake and the intended correct offer are clearly evident on the face of the proposal, in which event the proposal may not be withdrawn.

**10.14.4** If discussions are not held, or if the best and final offers upon which award will be made have been received, an Offeror alleging a material mistake of fact which makes a proposal non-responsive may be permitted to withdraw the proposal if: the mistake is clearly evident on the face of the proposal but the intended correct offer is not; or the Offeror submits evidence which clearly and convincingly demonstrates

that a mistake was made.

Technical irregularities are matters of form rather than substance evident from the proposal document, or insignificant mistakes that can be waived or corrected without prejudice to other Offerors; that is, when there is no effect on price, quality, or quantity. If discussions are not held or if best and final offers upon which award will be made have been received, the Procurement Officer may waive such irregularities or allow an Offeror to correct them if either is in the best interest of the State. Examples include the failure of an Offeror to: return the number of signed proposals required by the request for proposals; sign the proposal, but only if the unsigned proposal is accompanied by other material indicating the Offeror's intent to be bound; or to acknowledge receipt of an amendment to the request for proposal, but only if it is clear from the proposal that the Offeror received the amendment and intended to be bound by its terms; or the amendment involved had no effect on price, quality or quantity.

## **10.15 Modification Prior to Submittal Deadline or Withdrawal of Offers**

- 10.15.1** The Offeror may modify or withdraw a proposal before the proposal due date and time.
- 10.15.2** Any change, addition, deletion of attachment(s) or data entry of an Offer may be made prior to the deadline for submittal of offers



## Attachment A: Definitions and Acronyms

The following definitions and acronyms apply to this solicitation.

**BAFO** means Best and Final Offer

**Contract Administrator** means the person designated to manage the various facets of the contract to ensure Contractor's total performance is in accordance with the contractual commitments and obligations are fulfilled.

**CPO** means Chief Procurement Officer

**DAGS** means Department of Accounting and General Services

**EC** means Evaluation Committee

**GET** means General Excise Tax

**GP** means General Provisions

**GC** means General Conditions, form AG-008 103D, Department of the Attorney General

**HAR** means Hawaii Administrative Rules

**HCE** means Hawaii Compliance Express

**HlePRO** means Hawaii State eProcurement System

**HRS** means Hawaii Revised Statutes

**HST** means Hawaii Standard Time

**Offeror** means any individual, partnership, firm, corporation, joint venture, or other entity submitting directly or through a duly authorized representative or agent, an offer in response to this solicitation.

**Procurement Officer** means the contracting officer for the State of Hawaii, State Procurement Office

**RFP** means Request for Proposals

**SPO** means State Procurement Office of the State of Hawaii

**State** means State of Hawaii, including each department(s) and political subdivision(s)

**Training Course** means each subject, such as SPO-100, inclusive of each Training Module

**Training Module** means portions of each Training, such as SPO-100 part 1 and part 2

**Vendor** means equal to the term “Contractor” as defined in the SPO General Provisions.

## Attachment B: Scope of Work

All shall be in accordance with this RFP, including its attachments and any addenda.

The Scope of Work for this solicitation is set forth below and is hereby incorporated by reference into this solicitation and any subsequent contract award.

The SPO is seeking services to revamp its online, on-demand procurement training courses and modules by modifying and updating existing training courses and modules, developing new training courses, and delivering the material in an interesting and attractive way.

### A Contract Goal

The goal of this contract is to provide government purchasing staff clear, engaging procurement training courses that give them a solid foundation and help them to do their work effectively and efficiently. The contractor will research, modify existing training courses and modules, and develop new training courses. The new and updated training courses will then be integrated into an existing learning management system by SPO.

### B Description

Updating and developing training courses and modules will (1) provide for a more manageable lesson structure; (2) foster better information retention, and (3) enhance the ability to find specific information quickly.

The SPO provides guidance to government purchasing staff for both HRS 103D and 103F procurements by offering online, on-demand training courses. The SPO also answers questions through meetings, telephone calls, or emails and provides resources on the SPO website.

The Hawaii Revised Statutes, Hawaii Administrative Rules, Procurement Circulars, and Procurement Directives can be found at:

<http://spo.hawaii.gov/references/>.

The Procurement Wizard, which is an online procurement manual is available at: <http://spo.hawaii.gov/procurement-wizard/>.

The SPO desires to update and enhance some of the online, on-demand training courses and modules located at: <http://spo.hawaii.gov/for-state-county-personnel/training/on-demand-training/>. The SPO also wishes to have additional training courses developed.

To start with, the SPO would like the following training courses and modules modified:

- SPO 100 Competitive Sealed Bidding, Parts 1 and 2

- SPO 105 Competitive Sealed Proposals, Parts 1 and 2
- SPO 115 Professional Services
- SPO 120 Small Purchase Method of Procurement

The SPO would also like the following training course developed:

- Market Research

Based on funding and schedule, the SPO reserves the right to have additional or fewer training courses modified and/or developed during the contract term.

## **C Project Requirements**

Minimum Requirements for all training modules:

- Length of training courses should be made into training modules of at most 20-30 minutes, as needed.
- Create and add 2-3 questions with answers and incorporate throughout the training modules as part of the presentation with the viewer having to press a “next” button in order to progress in the module.
- For each training course, create a test with 10 multiple-choice questions to be used for a final graded test to cover the entire training course by randomly drawing 5 questions at a time from the 10 requiring 100% correct to pass, a sample of current questions will be provided
- Use of SPO logo or PowerPoint slide template with SPO logo will be provided as needed
- Recorded training courses and modules would be rewindable at will by the viewer
- SPO retains all rights to training courses, training modules, and related materials.
- Must be SCORM 1.2 compliant or in a format compatible with Percepium Learning Management System.
- Content must be editable using standard, non-proprietary authoring tools such as Microsoft Office (such as Powerpoint), iSpring, or Camtasia Studio.
- Content must be ADA and 508 compliant for users with screen readers and other adaptive software. Voice-over narration must include closed-captioning and a transcript.
- Include a .MP4 video version of all training courses and modules

Preferable:

- Side reference bar with slide related links to the Wizard that would open in a separate page to maintain presence in training courses and modules
- Create and insert additional peripherals or visuals as needed to enhance the learning experience
- Different levels of interactivity to suit content and audience needs

- Navigational elements that help the viewers know where they are in the training courses and modules
- Information is succinct, logical, and clearly divided through the effective use of color, graphics, borders, and white space
- Use of Powerpoint with iSpring add-on, which is compatible with SPO's current tools

### **C.1 Training Course Requirements list for all courses:**

The consultant shall perform an overall assessment of the current condition of the State procurement training courses and modules. The consultant's responsibilities shall include all activities required, inclusive of assessing the training courses and modules to update and develop training courses and modules. The following is a nonexclusive list of tasks the consultant shall perform:

- Research current statutes, circulars, and other content specific data to ensure that current information is included in the training by revising outdated material, if any
- Show completion schedule with an agile model of being on task with progress checks
- Structure the training courses and modules to focus on the target audience who are state employees that are novices to procurement
- Identify key learning objectives to help focus the viewer and ensure the desired knowledge or skills are learned
- Determine break points to adjust training courses into training modules
- Identify each technology to be used to work on the training courses and modules and provide SPO a manual for each technology on how to edit
- Create and add 2-3 questions with answers and incorporate throughout the training modules as part of the presentation with the viewer having to press a "next" button in order to progress in the module.
- For each training course, create a test with 10 multiple-choice questions to be used for a final graded test to cover the entire training course by randomly drawing 5 questions at a time from the 10 requiring 100% correct to pass
- Submit the final recorded training for review and approval by SPO along with transcript
- Include an .MP4 video version of the training course and modules
- Maintain and submit a log of any changes made to training course and modules

### **C.2 Market Research – requirements for new module**

In addition to the task list shown above in C.1 of this attachment, the following should be considered in the Market Research module:

- Historical pricing data for Market research
- Published data for Market Research

- Market research data from buyers and other experts
- Market Research data from prospective offerors
- Market Research data from other sources
- Using Market Research to estimate probable price
- Contract Awarded Labor Category tool
- Hawaii Revised Statutes and/or Hawaii Administrative Rules, as applicable

Specific tools and guidance to use those tools shall include:

- Hawaii DBEDT economic statistics, as well as federal statistic sites and indices such as the cpi, interest rate and inflation rate indices.
- GSA library and Advantage
- Hawaii State-wide contracts, SPO Hawaii Awards and Notices Database (HANDS) and Fedbizops for research into similar solicitations and awards.

Any tools such as IBIS that are only accessible through subscription shall NOT be addressed in this module. That is, only free tools shall be included.