Hawaii Public Housing Authority
State of Hawaii

RFP ITO-2020-39

Request for Proposals for the Provision of Cloud-Based Software Platform to the Hawaii Public Housing Authority

Note: If this Request for Proposals (RFP) was downloaded from the Hawaii Public Housing Authority website, each respondent must provide the necessary contact information to the listed RFP Coordinator to be notified of any changes and to ensure receipt of all applicable RFP information. Interested offerors are advised to complete the RFP Registration Form, email or mail the form to the RFP Coordinator. The HPHA shall not be responsible for any missing addenda, clarifications, attachments or other pertinent RFP information not received by interested offerors.

Issued January 27, 2021
# RFP Table of Contents

## Section 1 – Administrative Overview

<table>
<thead>
<tr>
<th>Section</th>
<th>Title</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>I.</td>
<td>Authority</td>
<td>1</td>
</tr>
<tr>
<td>II.</td>
<td>RFP Organization</td>
<td>1</td>
</tr>
<tr>
<td>III.</td>
<td>Contracting Office</td>
<td>1</td>
</tr>
<tr>
<td>IV.</td>
<td>Procurement Timeline</td>
<td>3</td>
</tr>
<tr>
<td>V.</td>
<td>Pre-Proposal Teleconference</td>
<td>3</td>
</tr>
<tr>
<td>VI.</td>
<td>Submission of Written Questions</td>
<td>3</td>
</tr>
<tr>
<td>VII.</td>
<td>Submission of Sealed Proposals</td>
<td>4</td>
</tr>
<tr>
<td>VIII.</td>
<td>Discussions with Offerors Prior to Submission</td>
<td>6</td>
</tr>
<tr>
<td>IX.</td>
<td>Opening of Proposals</td>
<td>6</td>
</tr>
<tr>
<td>X.</td>
<td>Additional Materials and Documentation</td>
<td>6</td>
</tr>
<tr>
<td>XI.</td>
<td>RFP Amendments</td>
<td>6</td>
</tr>
<tr>
<td>XII.</td>
<td>Additional Terms and Conditions</td>
<td>7</td>
</tr>
<tr>
<td>XIII.</td>
<td>Cancellation of Request for Proposals</td>
<td>7</td>
</tr>
<tr>
<td>XIV.</td>
<td>Costs for Proposal Preparation and Verification</td>
<td>7</td>
</tr>
<tr>
<td>XV.</td>
<td>Mistakes in Proposals</td>
<td>7</td>
</tr>
<tr>
<td>XVI.</td>
<td>Rejection of Proposals</td>
<td>7</td>
</tr>
<tr>
<td>XVII.</td>
<td>Withdrawal of Proposals</td>
<td>8</td>
</tr>
<tr>
<td>XVIII.</td>
<td>Best Available Data</td>
<td>8</td>
</tr>
<tr>
<td>XIX.</td>
<td>Notice of Award</td>
<td>8</td>
</tr>
<tr>
<td>XX.</td>
<td>Protests</td>
<td>8</td>
</tr>
<tr>
<td>XXI.</td>
<td>Availability of Funds</td>
<td>9</td>
</tr>
<tr>
<td>XXII.</td>
<td>General and Special Conditions of Contract</td>
<td>9</td>
</tr>
<tr>
<td>XXIII.</td>
<td>Cost Principles</td>
<td>10</td>
</tr>
<tr>
<td>XXIV.</td>
<td>Campaign Contributions by State and County Contractors Prohibited</td>
<td>10</td>
</tr>
</tbody>
</table>

## Section 2 – Scope of Services

<table>
<thead>
<tr>
<th>Section</th>
<th>Title</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>I.</td>
<td>Introduction</td>
<td>11</td>
</tr>
<tr>
<td>A.</td>
<td>Purpose</td>
<td>11</td>
</tr>
<tr>
<td>B.</td>
<td>Funding Source and Period of Availability</td>
<td>11</td>
</tr>
<tr>
<td>II.</td>
<td>General Requirements</td>
<td>12</td>
</tr>
<tr>
<td>A.</td>
<td>Qualifying Requirement</td>
<td>12</td>
</tr>
<tr>
<td>B.</td>
<td>Type of Contract</td>
<td>17</td>
</tr>
<tr>
<td>C.</td>
<td>Single or Multiple Contracts to be Awarded</td>
<td>18</td>
</tr>
<tr>
<td>D.</td>
<td>Single or Multi-Term Contracts to be Awarded</td>
<td>18</td>
</tr>
<tr>
<td>E.</td>
<td>Contract Price Adjustment</td>
<td>20</td>
</tr>
<tr>
<td>III.</td>
<td>Contract Monitoring and Remedies</td>
<td>20</td>
</tr>
<tr>
<td>A.</td>
<td>Monitoring</td>
<td>20</td>
</tr>
<tr>
<td>B.</td>
<td>Termination</td>
<td>21</td>
</tr>
</tbody>
</table>
IV. Scope of Services  
A. Objectives .......................................................... 21  
B. Systems User Requirements ........................................ 22  
C. System Interface Requirements .................................... 23  
D. Technical Requirements ............................................. 23  
E. Administrative Requirements ....................................... 23

Section 3 – Proposal Forms and Instructions  
I. General Instructions .................................................... 26  
II. Proposal Forms ........................................................ 27  
III. Proposal Application ................................................ 27

Section 4 – Proposal Evaluation and Award  
I. Proposal Evaluation ..................................................... 34  
II. Mandatory Requirements ............................................ 36  
III. Technical Review ...................................................... 36  
IV. Price Proposal Review ............................................... 36  
V. Method of Award ........................................................ 37

Section 5 – Attachments  
1. Wage Certificate  
   Due March 4, 2021
2. Acknowledgement of Addenda  
   Due March 4, 2021
3. Sample Price Proposal  
   For Information Only
4. Sample Contract for Cloud-Based Software Platform Sandbox  
   For Information Only
5. Sample Contract for Cloud-Based Software Platform Licenses  
   For Information Only
6. General Conditions, State AG-008 103D  
   For Information Only
7. General Conditions, Federal HUD Form 5370-C  
   For Information Only
8. Instruction to Offerors, HUD Form 5369-B  
   For Information Only
9. Certifications and Representations of Offerors HUD Form 5369-C  
   For Information Only
10. Hawaii State Government Holiday Schedule  
    For Information Only
11. Proposal Submittal Checklist
   For Information Only
12. Sample Transmittal Letter
    For Information Only
13. Technical Requirements Matrix in Excel Format
    Due March 4, 2021
I. Authority

The Hawaii State Legislature established the Hawaii Public Housing Authority ("HPHA") under chapter 356D, Hawaii Revised Statutes (HRS). The HPHA provides low income housing in the State of Hawaii and is administratively attached to the Department of Human Services. The HPHA is a public body and a body corporate and politic of the State of Hawaii. The HPHA's role is to address the housing needs of low income families in Hawaii.

A determination has been made that the HPHA is unable to secure services through a low bid process. Factors included in the determination were 1) Price is not the primary consideration in determining an award; 2) The resulting Contract needs to be other than a fixed-price type; 3) The specifications for the services cannot be sufficiently described through a low bid process; 4) Oral or written discussions need to be conducted with Offerors concerning their proposals; 5) Offerors may need to revise their proposals, including price; and 6) The award needs to be based on a comparative evaluation in order to determine the most advantageous offer to the State. To that end, a low bid process is not practicable to the HPHA for procurement of a software platform.

This RFP is issued under the provisions of chapter 103D, HRS. Offerors are charged with presumptive knowledge of all requirements of the cited authorities. Submission of a proposal by any offeror shall 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 an overview of the procurement and contracting process.

Section 2 Scope of Work and Specifications – Provides a general description of the tasks to be performed, delineates Offeror's responsibilities, and defines deliverables as applicable.

Section 3 Proposal Form and Instructions – 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:

Hawaii Public Housing Authority
Contract and Procurement Office
1002 North School Street, Bldg. D
Honolulu, Hawaii 96817
Telephone: (808) 832-6038

The RFP Coordinator or his/her designated representative is listed below:

Ms. Tammie Wong
Hawaii Public Housing Authority
Contract and Procurement Office
1002 North School Street, Bldg. D
Honolulu, Hawaii 96817
Telephone: (808) 832-6071
Email: tammie.y.wong@hawaii.gov

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

The Information and Technology Office is the office 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 listed as follows:

Mr. Nelson Lee
Hawaii Public Housing Authority
Information Technology Office
1002 North School Street, Bldg. B
Honolulu, Hawaii 96817

The HPHA reserves the right to change the Contract Administrator. Any changes to the Contract Administrator or his/her designated representative shall be provided in writing to the Successful Offeror. Once the Successful Offeror has assumed management responsibilities for the properties, all communications regarding approvals, reports, and requests will be directed to the Contract Administrator.
IV. Procurement Timeline

<table>
<thead>
<tr>
<th>Activity</th>
<th>Scheduled Dates</th>
</tr>
</thead>
<tbody>
<tr>
<td>Public notice announcing RFP</td>
<td>Jan. 27, 2021</td>
</tr>
<tr>
<td>Distribution of proposal specs/proposal form</td>
<td>Jan. 27, 2021</td>
</tr>
<tr>
<td>Pre-Proposal Teleconference</td>
<td>Feb. 4, 2021</td>
</tr>
<tr>
<td>Deadline to submit written questions</td>
<td>Feb. 9, 2021</td>
</tr>
<tr>
<td>State Response to Written Questions</td>
<td>Feb. 16, 2021</td>
</tr>
<tr>
<td>Proposal Submittal Deadline</td>
<td>Mar. 4, 2021; 4:00 p.m. HST</td>
</tr>
<tr>
<td>Proposal Evaluation</td>
<td>March 2021</td>
</tr>
<tr>
<td>Notice of Award</td>
<td>March 2021</td>
</tr>
<tr>
<td>Contract Execution</td>
<td>April 2021</td>
</tr>
<tr>
<td>Start of Services</td>
<td>Upon issuance of a Notice to Proceed*</td>
</tr>
</tbody>
</table>

*Issuance of a Notice to Proceed (NTP) for the sandbox is anticipated to be six (6) months from the issuance of Notice of Award; The NTP for the software platform licenses will be determined at a later date.

The HPHA reserves the right to amend or revise the procurement timeline without prior written notice when it is in the best interest of the State.

V. Pre-Proposal Teleconference

The HPHA Contract and Procurement Office will conduct a Pre-Proposal Teleconference at 1:00 p.m. Hawaii Standard Time (HST), Thursday, February 4, 2021. Offerors interested in participating in the teleconference are to contact the RFP Coordinator by Wednesday, February 3, 2021, 2:00 p.m. HST for teleconference information. All interested offerors are strongly encouraged to participate in the Pre-Proposal Conference.

Impromptu questions will be permitted at the teleconference and verbal answers will be provided. Verbal answers provided by the HPHA are not binding and only intended for general direction purposes. Formal written responses to substantive questions will be provided in writing to each registered interested offeror as set forth in Section VII below not later than Tuesday, February 16, 2021. All changes to the RFP will be issued as an addendum to the RFP.

VI. Submission of Written Questions

Interested offerors may submit written questions to the RFP Coordinator identified in Section 1 of this RFP. The deadline for submission of written questions is Tuesday, February 9, 2021. All written questions will receive a written response from the HPHA. The HPHA does not guarantee receipt of questions submitted via electronic mail. The HPHA's responses to written questions will be issued not later than Tuesday, February 16, 2021. Written
questions may be hand-delivered, submitted by electronic mail, or via U.S. postal service.

VII. Submission of Sealed Proposals

A. **Forms/Formats.** Proposals must be submitted following the format as prescribed in Section 3 – Proposal Form and Instructions of the RFP.

Offerors shall also follow the U.S. Department of Housing and Urban Development Instructions to Offerors Non-Construction Form HUD 5369-B and Certifications and Representations of Offers Non-Construction Contract, Form HUD 5369-C. The instructions can be downloaded from HUD Clips at www.hudclips.org and is an attachment to this proposal. See Attachments 8 and 9.

B. **Proposal Submittal.** Sealed proposals shall be received by the HPHA Central Files Office at 1002 N. School Street, Bldg. D, Honolulu, Hawaii 96817 not later than 4:00 p.m. HST, Thursday, March 4, 2021. The official receipt time of mailed-in and hand-delivered proposals shall be the recorded time using the HPHA's time stamp clock. Deliveries by mail/courier services, including without limitation United States Postal Services and Federal Express, shall be considered hand deliveries. **Electronic mail submissions shall not be accepted.**

Sealed Proposals should be addressed to:

Hawaii Public Housing Authority  
1002 N. School Street  
Central Files Office, Building D  
Honolulu, Hawaii 96817  
Attn: Ms. Tammie Wong, RFP Coordinator

Proposals received after 4:00 p.m. HST, Thursday, March 4, 2021 shall not be accepted.

The register of proposals listing proposals received shall be available for public inspection after the award of the Contract.

C. **Pre-opening Modification.** Proposals may be modified prior to the proposal deadline with the following documents in accordance with section 3-122-16.07, Hawaii Administrative Rules ("HAR"):  

1. A written notice accompanying the actual modification received in the HPHA Contract and Procurement Office stating that a modification to the proposal is submitted.
2. An electronic written notice submitted by electronic mail to the RFP Coordinator. Offeror shall submit the original signed written notice and modification to the HPHA, Contract and Procurement Office within two (2) working days of receipt of the electronic transmittal. If the written notice is submitted less than two (2) working days prior to the established due date and time of the proposal deadline, the offeror shall submit the original signed written notice and the modification to the HPHA Contract and Procurement Office, 1002 North School Street, Bldg. D, Honolulu, Hawaii 96817 and time stamped by the HPHA. 

All request for modifications shall be sealed, the envelope or package shall be clearly identified as a modification to the proposal submission with reference to this RFP (RFP No. ITO-2020-39), accompanied by the actual modifications to the proposal signed by an authorized representative, and must be received by the HPHA not later than 4:00 p.m. HST, Monday, February 22, 2021.

D. Wages and Labor Law Compliance. Prior to entering into a Contract in excess of $25,000, an Offeror shall certify that it complies with section 103-55, HRS, wages, hours, and working conditions of employees of contractors performing services. Section 103-55, HRS, provides that the services to be performed shall 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 Successful Offeror shall be obligated to provide such increased wages.

Offerors shall complete and submit the attached Wage Certification certifying that the services required will be performed pursuant to section 103-55, HRS. See Attachment 1.

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

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

E. Confidential Information. If an offeror believes that any portion of a proposal contains information that should be withheld as confidential, the offeror shall request in writing nondisclosure of designated proprietary information to be confidential and provide justification to support the designation of confidentiality. Such information shall accompany the proposal, clearly marked, and shall be readily separable from the proposal.
submittal documents to facilitate eventual public inspection of the non-confidential sections of the proposal submittal documents. Nondisclosure of requested information is subject to chapter 92F, HRS, and is discoverable unless exempted by law. Note that price is not considered confidential and shall not be withheld.

F. Exceptions. Offerors shall list in their proposal any exceptions made to the terms, conditions, specifications, or other requirements listed herein. Offerors must reference the RFP section where the exception is made, provide a description of the exception, and any proposed alternative. The HPHA shall retain the right to grant exceptions to discretionary policies. Requests for exceptions to State, Federal, or local laws shall not be approved.

VIII. Discussion with Offerors Prior to Submission

Discussions may be conducted with offerors to promote understanding of the HPHA requirements.

IX. Opening of Proposals

Upon receipt of proposals by the HPHA at the designated location, proposals, modifications to proposals, and withdrawals of proposals shall be date and time stamped. All documents so received shall be held in a secure place by the HPHA and shall not be examined for evaluation purposes until the submittal deadline. Procurement files shall be open to public inspection after a contract has been awarded and executed by all parties. Sealed proposals shall not be opened publicly.

X. Additional Materials and Documentation

Samples or descriptive literature should not be submitted unless specifically requested in the RFP. Any unsolicited documentation, literature, samples, or brochures will not be examined or tested, and will not be deemed to vary any of the provisions of this RFP.

XI. RFP Amendments

The HPHA reserves the right to amend this RFP at any time prior to the closing date for the final revised proposals or as allowed under chapter 3-122, HAR. Interested offerors registered with the HPHA using the RFP Registration Form will be notified of all amendments through written communication which may include electronic mail or USPS mail.
XII. Additional Terms and Conditions

The HPHA reserves the right to add terms and conditions during contract negotiations and discussions. These terms and conditions shall be within the scope of the RFP and will not affect the proposal evaluation.

XIII. Cancellation of the Request for Proposals

This RFP may be canceled and any or all proposals may be rejected in whole or in part when determined by the HPHA to be in the best interests of the State.

XIV. Costs for Proposal Preparation and Verification

Any costs incurred by offerors in preparing or submitting a proposal are the offeror’s sole responsibility. Any costs incurred by the Successful Offeror prior to the execution of a Contract are not eligible for reimbursement.

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

**Offerors shall ensure that the HPHA is provided with the written authorization(s) necessary to verify information provided in the offeror’s proposal.**

XV. Mistakes in Proposals

While offerors are bound by their proposal, circumstances may arise where a correction or withdrawal of proposal is proper. An obvious mistake in a proposal may be corrected or withdrawn, or waived by the HPHA to the extent that it is not contrary to the best interest of the HPHA or to the fair treatment of other offerors. Mistakes in proposals shall be handled as provided for pursuant to chapter 3-122, Hawaii Administrative Rules (HAR) and U.S. Department of Housing and Urban Development (HUD) requirements as specified in HUD Handbook 7460.8.

XVI. Rejection of Proposals

The HPHA reserves the right to consider as acceptable only those proposals received in accordance with the requirements set forth in this RFP and which demonstrate an understanding of the specifications. Proposals may be rejected without further notice if it is:

1. Determined to be unreasonable in price, including the total price of the proposal and the price of the individual items: or

2. Determined to offer a set of terms or conditions that are contradictory to the minimum requirements included in this RFP.
The HPHA reserves the right to reject any and all submittals and to accept the submittals in whole or part in the best interest of the State.

XVII. Withdrawal of Proposals

Proposals may be withdrawn upon written or facsimile request and should be received prior to 4:00 p.m. HST, Monday, February 22, 2021. Late requests for withdrawal may not be accepted. Negligence on the part of the offeror in preparing its proposal confers no right of withdrawal or modification of its proposal after the due date and time.

XVIII. Best Available Data

All information contained in this RFP is the best data available to the HPHA at the time the RFP was prepared. The information given in the RFP is not intended as representations having binding legal effect. This information is furnished for the convenience of offerors and the HPHA assumes no liability for any errors or omissions.

XIX. Notice of Award

After proposal evaluation and verification that the highest ranked Offeror demonstrates compliance with section 3-122-112, HAR, Responsibility of Offeror, a Notice of Award will be issued to the highest ranked Offeror indicating that the Offeror has been selected to provide the services under this RFP.

The Successful Offer receiving an award shall be required to enter into two (2) formal written Contracts with the HPHA: one (1) Contract for the as-needed sandbox and one (1) Contract for the software platform licenses. See Attachments 4 and 5 for sample Contracts.

The Contracts arising out of this solicitation is subject to the approval by the Department of the Attorney General as to form, and to all further approvals, including the approval of HUD as may be required by State statute, federal regulation, rule, order or other directive.

No work is to be undertaken by the Successful Offeror prior to the Contract commencement date. The HPHA is not liable for any work, contract costs, expenses, loss of profits, or any damages whatsoever incurred by the Successful Offeror prior to the Contract starting date.

XX. Protests

Pursuant to section 103D-701, HRS, an actual or prospective Offeror who is aggrieved in connection with the solicitation or award of a contract 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.

(2) A state purchasing agency's failure to follow any rule established by chapter 103D, HRS.

(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 mailed by United States Postal Service (USPS) or hand delivered to the head of the State Contracting Office conducting the protested procurement and the Procurement Officer who is conducting the procurement as indicated below within five (5) business days after the aggrieved person knows or should have known of the facts giving rise thereto. A protest based upon the content of the solicitation shall be submitted in writing prior to the date set for receipt of Offerors. Further provided that a protest of an award or proposed award shall be submitted within five (5) days after the posting of award of the contract. Protests are deemed submitted upon receipt by the State Contracting Office. Any notice of award letter(s), resulting from this solicitation shall be posted on the Hawaii Award and Notices Data System on the State Procurement Office website at https://hands.ehawaii.gov/hands/.

<table>
<thead>
<tr>
<th>Head of State Contracting Office</th>
<th>Procurement Officer</th>
</tr>
</thead>
<tbody>
<tr>
<td>Name: Mr. Hakim Ouansafi</td>
<td>Name: Mr. Rick T. Sogawa</td>
</tr>
<tr>
<td>Title: Executive Director</td>
<td>Title: Procurement Officer</td>
</tr>
<tr>
<td>Mailing Address: P.O. Box 17907</td>
<td>Mailing Address: P.O. Box 17907</td>
</tr>
<tr>
<td>Honolulu, Hawaii 96817</td>
<td>Honolulu, Hawaii 96817</td>
</tr>
<tr>
<td>Business Address: 1002 N. School St, Bldg. E</td>
<td>Business Address: 1002 N. School St, Bldg. D</td>
</tr>
<tr>
<td>Honolulu, Hawaii 96817</td>
<td>Honolulu, Hawaii 96817</td>
</tr>
</tbody>
</table>

XXI. Availability of Funds

The award of a Contract and any allowed renewal or extension thereof, are subject to allotments made by the Director of Finance, State of Hawaii, pursuant to Chapter 37, HRS, and subject to the availability and allotment of State and/or Federal funds.

XXII. General and Special Conditions of Contracts

The General Conditions that will be imposed contractually are included as an attachment. The State's General Conditions set forth in Attachment 6 may also be found on the State Procurement Office (SPO) website at www.spo.hawaii.gov. The HUD General Conditions set forth in Attachment 7 may also be found on the
HUD website at www.hud.gov. In the event there is a conflict between the State and Federal General Conditions, the more restrictive shall apply.

The HPHA may also impose contractually any necessary Special Conditions. See Special Conditions in Attachments 4 and 5. In the case of a conflict between the Special Conditions and the General Conditions, the Special Conditions shall apply.

The HPHA reserves the right to make modifications to the Scope of Work and or reporting requirements arising from unforeseeable conditions.

XXIII. Cost Principles

The HPHA shall utilize standard cost principles in section 3-123, HAR, which are available on the SPO website. Nothing in this section shall be construed to create an exemption from any cost principle arising under federal law.

XXIV. Campaign Contributions by State and County Contractors Prohibited

If awarded a Contract in response to this solicitation, the Successful 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 Contractor 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. INTRODUCTION

A. Purpose

The Hawaii State Legislature established the Hawaii Public Housing Authority (HPHA) under chapter 356D, HRS. The HPHA is a public body and a body corporate and politic and is attached to the Department of Human Services for administrative purposes only. The HPHA’s role is to address the housing needs of low income families of Hawaii.

The HPHA is seeking to upgrade its business software system to a cloud-based software platform. The purpose of this Request for Proposals (RFP) is to procure for cloud-based enterprise software as a Service (SaaS) Platform to be a system of record and system of engagement supporting all critical workflow operations of the HPHA, including without limitation, application for federal/state low income public housing, application for Housing Choice Voucher, and submission of maintenance requests. This solicitation is open to proposals from both generic and industry specific platforms.

B. Funding Source and Period of Availability

Funds are subject to appropriation by the State Director of Finance and/or U.S. Congress and allocation by the Governor, State Legislature and/or the U.S. Department of Housing and Urban Development (HUD). Funding and period of availability may change upon written notice by the HPHA.

It is understood that the Contract shall not be binding, unless the HPHA can document that there is 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 HPHA. 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 terms of the Contract are likely to be available. Pursuant to section 103D-315, HRS, the HPHA 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 State shall be liable to pay for services at the federal public housing properties with State funds. However,
should an allocation of State funds become available, the State reserves the right to pay for a portion of services using State funds.

II. GENERAL REQUIREMENTS

A. Qualifying Requirements

1. The Successful Offeror must have no outstanding balances owing to the HPHA. Exceptions may be granted by the Executive Director of the HPHA for debts recently acquired and for debts which have a repayment plan approved by the Executive Director of the HPHA.

2. Prior to award of a Contract, the Successful Offeror shall furnish proof of compliance with requirements of section 3-122-112, HAR:

   a. Chapter 237, HRS, tax clearance;

   b. Chapter 383, HRS, unemployment insurance;

   c. Chapter 386, HRS, workers' compensation;

   d. Chapter 392, HRS, temporary disability insurance;

   e. Chapter 393, HRS, prepaid health care; and

   f. One of the following:

      i. Be registered and incorporated or organized under the laws of the State of Hawaii (hereinafter referred to as a "Hawaii business").

      **Hawaii business.** A business entity referred to as a "Hawaii business" is registered and incorporated or organized under the laws of the State of Hawaii. As evidence of compliance, the offeror shall submit a CERTIFICATE OF GOOD STANDING issued by the Department of Commerce and Consumer Affairs Business Registration Division (BREG). A Hawaii business doing business as a sole proprietorship is not required to register with the BREG, and therefore not required to submit the certificate. A Successful Offeror's status as sole proprietor or other business entity and its business street address will be used to confirm that the Successful Offeror is a Hawaii business.

      ii. Be registered to do business in the State of Hawaii (hereinafter referred to as a "compliant non-Hawaii business").
Compliant non-Hawaii business. A business entity referred to as a “compliant non-Hawaii business,” is not incorporated or organized under the laws of the State of Hawaii, but is registered to do business in the State. As evidence of compliance, the interested respondent shall submit a CERTIFICATE OF GOOD STANDING.

The above certificates should be applied for and submitted to the HPHA as soon as possible. If a valid certificate is not submitted on a timely basis for award of a Contract, the offeror may not receive the award.

4. Business Office

The Successful Offeror shall have a permanent office in the State where it conducts business and where it will be accessible in person or via telephone calls during normal Hawaii State government business hours from 7:45 a.m. to 4:30 p.m., HST, to address complaints or requests that require immediate attention. See Attachment 10 for Hawaii State Government Holiday Schedule. An answering service is not acceptable. A permanent office location and phone number shall be stated in the Offeror’s proposal.

5. Certifications of Eligibility

Prior to award of a Contract, Offerors shall submit the following documents with their proposal to the HPHA to demonstrate compliance with Federal and State laws:

a. Tax Clearance, Form A-6;

b. Department of Labor and Industrial Relations, Application for Certificate of Compliance, Form LIR #27; and

c. Certificate of Good Standing issued by the Department of Commerce and Consumer Affairs Business Registration Division (BREG).

Alternatively, the Offeror may demonstrate compliance utilizing the Hawaii Compliance Express (HCE), which allows businesses to register online through a simple wizard interface at:

http://vendors.ehawaii.gov/hce/splash/welcome.html

The HCE provides the applicant with a “Certificate of Vendor Compliance” with current compliance status as of the issuance date, accepted for both contract award and final payment purposes. Businesses electing to use
the HCE services will be required to pay an annual subscription fee of $12.00.

6. Indemnification

The Successful Offeror shall defend, indemnify, and hold harmless the State of Hawaii, the HPHA, its elected and appointed officials, officers, and employees from and against all liability, loss, damage, cost, and expense, including all attorney fees and all claims, suits, and demands arising out of or resulting from the acts or omissions of the Successful Offeror or the Successful Offeror’s officers, employees, agents or subcontractors.

7. Insurance Requirements

Within fifteen (15) days after award of the Contract and prior to the execution of the Contract, the Successful Offeror shall furnish to the Contracting Officer valid certificate(s) of insurance as evidence of the following minimum insurance coverage requirements:

<table>
<thead>
<tr>
<th>Coverages</th>
<th>Limits</th>
</tr>
</thead>
<tbody>
<tr>
<td>Commercial General Liability with Personal Injury Liability</td>
<td>$1,000,000.00 per occurrence for bodily injury and personal property damage and $2,000,000.00 general aggregate.</td>
</tr>
<tr>
<td></td>
<td>Personal injury liability limit of $1,000,000.00 per occurrence.</td>
</tr>
<tr>
<td>Automobile Insurance</td>
<td>Bodily injury liability limits of $1,000,000.00 each person and $1,000,000.00 per accident and property damage liability limits of $1,000,000.00 per accident OR $2,000,000.00 combined single limit.</td>
</tr>
<tr>
<td>Workers’ Compensation as required by applicable State laws.</td>
<td>Insurance to include Employer’s Liability. Both such coverages shall apply to all employees of the Successful Offeror and to all employees of sub-contractors in case any sub-contractor fails to provide adequate similar protection for all its employees.</td>
</tr>
</tbody>
</table>
A certificate of insurance evidencing such insurance is required prior to commencement of services. The certificate of insurance required by this Contract shall contain the following clauses:

"The State of Hawaii, the Hawaii Public Housing Authority, its elected and appointed officials, officers, and employees shall be named as additional insured, except for Professional Liability Insurance and Workers Compensation Insurance, as respects to operations performed for the State of Hawaii under this Contract."

The Successful Offeror agrees to provide the HPHA before the effective date of the Contract, certificates(s) of insurance necessary to satisfy the HPHA that the Successful Offeror is in compliance with the insurance provisions of this Contract and to keep such insurance in effect and the certificate(s) therefore on deposit with the HPHA during the entire term of this Contract. Upon request of the HPHA, the Successful Offeror shall furnish a copy of the policy or policies. The minimum insurance required shall be in full compliance with the Hawaii Insurance Code throughout the entire term of the Contract, including all Supplemental Contract(s).

Failure of the Successful Offeror to provide and keep in force such insurance shall be regarded as material default under this Contract and shall entitle the HPHA to exercise any or all of the remedies provided in this Contract for default of the Successful Offeror.

The procuring of such required policy or policies of insurance shall not be construed to limit the Successful Offeror's liability hereunder or to fulfill the indemnification provisions and requirements of this Contract. Notwithstanding said policy or policies of insurance, the Successful Offeror shall be obligated for the full and total amount of any damage, injury, or loss caused by negligence or neglect connected with this Contract.

The Successful Offeror shall immediately provide written notice to the Contracting department or the HPHA should any of the insurance policies evidenced on its Certificate of Liability Insurance be cancelled, limited in scope or not renewed upon expiration.

The HPHA is a self-insured State agency. The Successful Offeror's insurance shall be primary. Any insurance maintained by the State of Hawaii shall apply in excess of, and shall not contribute with, insurance provided by the Successful Offeror.

To satisfy the minimum coverage limits required by this Contract, the Successful Offeror may use an umbrella policy in addition to the mandatory insurance policies (i.e., General Liability Insurance, Automobile
Insurance, and Workers' Compensation) provided that the HPHA approves, and the umbrella policy follows the underlying coverage forms.

8. Section 3 of the U.S. Housing Act of 1968

a. The work to be performed under this Contract is subject to the requirements of section 3 of the Housing and Urban Development Act of 1968, as amended, 12 U.S.C. 1701u (section 3). The purpose of section 3 is to ensure that employment and other economic opportunities generated by HUD assistance or HUD-assisted projects covered by section 3 shall to the greatest extent feasible, be directed to low- and very low-income persons, particularly persons who are recipients of HUD assistance for housing.

b. The parties to this Contract agree to comply with HUD's regulations in 24 CFR part 135, which implement section 3. As evidenced by their execution of this Contract, the parties to this Contract certify that they are under no contractual or other impediment that would prevent them from complying with the part 135 regulations.

c. The Successful Offeror agrees to send to each labor organization or representative of workers with which the Successful Offeror has a collective bargaining agreement or other understanding, if any, a notice advising the labor organization or workers' representative of the Successful Offeror's commitments under this section 3 clause, and will post copies of the notice in conspicuous places at the work site where both employees and applicants for training and employment positions can see the notice. The notice shall: describe the section 3 preference; set forth minimum number and job titles subject to hire; disclose the availability of apprenticeship and training positions and the qualifications for each; provide the name and location of the person(s) taking applications for each of the positions; and the anticipated date the work shall begin.

d. The Successful Offeror agrees to include this section 3 clause in every subcontract subject to compliance with regulations in 24 CFR part 135, and agrees to take appropriate action as provided in an applicable provision of the subcontract or in this section 3 clause, upon a finding that the subcontractor is in violation of the regulations in 24 CFR part 135. The Successful Offeror shall not subcontract with any subcontractor where the Successful Offeror has notice or knowledge that the subcontractor has been found in violation of the regulations in 24 CFR part 135.

e. The Successful Offeror shall certify that any vacant employment positions, including training positions, that are filled (1) after the Successful Offeror is selected, but before the Contract is executed,
and (2) with persons other than those to whom the regulations of 24 CFR part 135 require employment opportunities to be directed were not filled to circumvent the Successful Offeror's obligations under 24 CFR part 135.

f. Noncompliance with HUD's regulations in 24 CFR part 135, may result in sanctions, termination of this contract for default, and debarment or suspension from future HUD assisted contracts.

9. Administrative Policies

At a minimum, the Successful Offeror shall maintain its own written policies that address the following:

a. Drug Free Workplace Policy;
b. Sexual Harassment Awareness in the Workplace Policy;
c. Non-Violence in the Workplace Policy;
d. Standards of Conduct;
e. Conflict of Interest;
f. Smoking Policy;
g. Safety Plan or Policies; and
h. Americans with Disabilities Act.

The Successful Offeror shall provide written documentation not later than 15 days after the notice to proceed that all staff are informed of its requirements and agree to comply with said policies. The Successful Offeror shall be solely responsible for the conduct of their employees and for their compliance with its administrative policies

B. Type of Contract

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

All proposals shall become the property of the HPHA. The Successful Offeror's proposal will be incorporated into the resulting Contract by reference. The stated requirements appearing elsewhere in this RFP shall be incorporated into the resulting Contract by reference.

The Successful Offeror shall be required to enter into a two (2) fixed-priced formal written Contracts with the HPHA in accordance with the laws, rules and regulations of the State of Hawaii. See Attachments 4 and 5 for sample Contracts for Goods and Services Based on Competitive Sealed Proposals.
Subsequent to the award and within 10 days after the prescribed contract forms are presented for signature, the Successful Offeror shall execute and deliver the original contract forms to the HPHA as specified by the HPHA.

2. Subcontracting

No work or services shall be subcontracted or assigned without the prior written approval of the HPHA. No subcontract shall under any circumstances relieve the Successful Offeror of his/her obligations and liability under contract with the HPHA. All persons engaged in performing the work covered by the Contract shall be considered employees of the Successful Offeror.

3. Contract Modification

The Contract may be modified only by a written document signed by the HPHA and personnel authorized to sign contracts on behalf of the Successful Offeror as designated in the corporate resolution.

4. Laws, Rules, Ordinances and Regulations

Reference to federal, state, city and county laws, ordinances, rules and regulations and standard specifications shall include any amendments thereto effective as of the date of the RFP.

5. Bonds

No performance or payment bond is required.

C. Single or multiple contracts to be awarded

☐ Single  ☒ Multiple  ☐ Single and/or Multiple

A single award will be made for execution of two (2) Contracts: one (1) Contract for as-needed sandbox and one (1) Contract for the annual software platform licenses.

D. Single or multiple-term contracts to be awarded

1. As-Needed Sandbox Contract

☒ Single term (≤ 12 mos)  ☐ Multi-term (> 12 mos)

Term of contract: six (6) Months
Length of each extension: Up to six (6) months; may be less than six (6) months when it is in the best interests of the State

Maximum length of contract: 12 months

The As-Needed Sandbox Contract shall be effective upon the HPHA’s issuance of a Notice to Proceed, anticipated to be six (6) months from issuance of a Notice of Award.

The following conditions must be met for an extension:

1. The Contractor experienced cost savings and has unexpended funds available that can be used to provide additional goods and services; or

2. The HPHA determines there is an ongoing need for the services and has funds to extend services not to exceed six (6) months. Contract extensions shall be awarded as agreed upon in the Primary Contract. Exceptions may be granted upon satisfactory justification such as increase in cost of services or cost of living increase; and

3. A Supplemental Contract must be executed prior to expiration of the Primary Contract or Supplemental Contract; and

4. The HPHA may be required to obtain HUD approval in writing of the extension prior to execution of a Supplemental Contract; and

5. The Contractor must obtain the HPHA approval in writing and a notice to proceed with the extension; and

6. The HPHA has determined that the Contractor has satisfactorily provided services over the current Contract term; and

7. Necessary Federal funds are appropriated and allotted for an extension.

The option to extend the Contract shall be exercised at the sole discretion of the HPHA. The Contract shall be extended at the same rates as proposed in the accepted proposal unless price adjustments are provided herein. Submission of a proposal constitutes acknowledgement of the Offeror that the Offeror is able and willing to contract for services for the duration of the Contract period. If the Contractor is unwilling or unable to fulfill the maximum allowable length of time on the Contract, the HPHA reserves the right to assign the costs of repurchase to any payments owed under the Contract. These costs may include, without limitation, reproduction costs, staff time and postage.
2. Software Platform Licenses Contract

☐ Single term (≤ 12 mos)  ☒ Multi-term (> 12 mos)

Term of contract: 60 Months

The Contract term shall be effective upon the HPHA’s issuance of a Notice to Proceed.

E. Contract Price Adjustment

Each price proposal herein shall be firm.

III. CONTRACT MONITORING AND REMEDIES

A. Monitoring

1. The Successful Offeror’s performance under the Contract shall be monitored on an ongoing basis through desktop monitoring, personal observation, site inspection, and/or other methods as deemed appropriate by the HPHA Contract Administrator or his/her designated representative(s), including without limitation HUD, the HPHA auditors, the State Legislature, and/or other designated representatives.

2. The HPHA may submit monitoring report(s) to the Successful Offeror listing any discrepancies or Contract violation(s) requiring correction. Theses discrepancies or Contract violation(s) must be corrected or implemented within the period as indicated in the notice issued by the HPHA to avoid delays in payment issuance or for payment adjustment purposes.

3. Failure to comply with the terms of the Contract may be cause for suspension or termination as provided in the General Conditions. The Successful Offeror may be required to submit additional written reports, including a corrective action plan, in response to monitoring conducted by the HPHA. These additional reports shall not be considered a change to the Scope of Services and shall continue for a duration of time as deemed necessary by the HPHA.

4. Should the Successful Offeror fail to comply with the requirements of the Contract, the HPHA may request a written corrective action plan, a timeline for implementation, and the responsible parties. The HPHA will monitor the Successful Offeror for implementation of the corrective action plan. The HPHA reserves the right to request regular or additional reports on progress towards compliance with the Contract and the corrective action plan.
5. Should the Successful Offeror continue to fail to comply with the requirements of the Contract, the HPHA reserves the right to engage the services of another company to perform the services, to remedy the defect or failure and to deduct such costs from monies due to the Successful Offeror or to directly assess the Successful Offeror.

6. In the event the Successful Offeror fails, refuses, or neglects to perform the services in accordance with the requirements of this RFP, and the Contract, the HPHA reserves the right to purchase in the open market, a corresponding quantity of services, and to deduct this cost from moneys due or that may thereafter become due the Successful Offeror. In case money due to the Successful Offeror is insufficient for this purpose, the Successful Offeror shall pay the difference upon demand by the HPHA. The HPHA may also utilize all other remedies provided under the Contract and by law and rules.

7. In the event the Successful Offeror is not performing the required services as contracted, the HPHA reserves the right to extend the Contract for intervals of less than 12 months. During this time, the HPHA will monitor the Successful Offeror’s performance and/or improvement and the implementation of its corrective action plan to determine whether the HPHA will continue to Contract with the Successful Offeror.

B. Termination

The HPHA reserves the right to terminate any Contract without penalty for cause or convenience as provided in the General Conditions. See Attachment 6.

IV. SCOPE OF SERVICES

A. Objectives

The Successful Offeror shall provide a cloud-based Software as a Service (SaaS) Platform to the HPHA on a license fee basis, including ongoing updates and feature enhancements. Implementation of the software platform is to achieve the following objectives:

1. Provide an online portal for easy access to information, proactive updates throughout processes.

2. Increase data collection and business intelligence for agency operations.

3. Redesign internal workflows to accommodate paperless collaboration and transitions.
4. Reduce process complexity, software training times, and manual data entry requirements of staff.

5. Provide seamless integration of data across systems allowing users to view, search, and modify external system data.

B. System User Requirements

At a minimum, the software platform shall support the following system users:

1. Two hundred (200) HPHA User licenses supporting various roles and functions as follows:

<table>
<thead>
<tr>
<th>HPHA User Roles</th>
<th>Estimated No. of Users Annually</th>
</tr>
</thead>
<tbody>
<tr>
<td>Administrative/IT</td>
<td>5</td>
</tr>
<tr>
<td>Other Users</td>
<td>195</td>
</tr>
<tr>
<td>Total</td>
<td>200</td>
</tr>
</tbody>
</table>

2. General Public and HPHA Resident Users as follows:

<table>
<thead>
<tr>
<th>Public/Resident User Roles</th>
<th>Estimated No. of Users Annually</th>
</tr>
</thead>
<tbody>
<tr>
<td>Maximum number of Resident seats (adults with logins)</td>
<td>10,000</td>
</tr>
<tr>
<td>Maximum number of Applicant seats (a.k.a. Logins or user accounts) for all program applicants, including people on waitlists</td>
<td>30,000</td>
</tr>
<tr>
<td>Unique page views to the HPHA website (pre-login)</td>
<td>200,000</td>
</tr>
</tbody>
</table>
C. System Interface Requirements

Software platform will be interfaced with the following systems, which are both internally managed by the HPHA and external to the agency:

<table>
<thead>
<tr>
<th>System</th>
<th>Owning Organization</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Financial Accounting and Management Information System</td>
<td>State of Hawaii Department of Accounting and General Services</td>
<td>Financial and Accounting Modules</td>
</tr>
<tr>
<td>Public and Indian Housing Information Center (PIC)</td>
<td>U.S. Department of Housing and Urban Development</td>
<td>Many sub-interfaces – Utility Allowances, Income Limits, Rent Calculations, Flat Rents, Submission of 50058 Files, etc.</td>
</tr>
</tbody>
</table>

D. Technical Requirements

Technical requirements of the software platform are provided in the Technical Requirements Matrix and shall include provision of a sandbox on an as-needed basis. The technical requirements are categorized into the following criteria capturing its features and functionalities:

<table>
<thead>
<tr>
<th>Technical Criteria</th>
<th>Features/Functionalities</th>
</tr>
</thead>
<tbody>
<tr>
<td>Ease-of-Use and Administration</td>
<td>Modern, easy-to-use interface for HPHA management, employees, and residents</td>
</tr>
<tr>
<td>Efforts to achieve technical requirements</td>
<td>Speed and ease of configuration for the subsequent implementation team</td>
</tr>
<tr>
<td>Platform extensibility</td>
<td>Ability for the HPHA to build upon the platform and modify it internally with low or no-code</td>
</tr>
</tbody>
</table>

See Attachment 13 for Technical Requirements Matrix.

F. Administrative Requirements

1. Established History and Domain Expertise

To ensure business continuity and project success, the HPHA is only accepting proposals from offerors with an established business history serving Public Housing Authorities (PHAs). The HPHA defines successful service as having met the following conditions:

   a. Offeror shall be required to have been in business for five (5) or more years with minimum experience of three (3) years in software development; and
b. Offeror shall have a minimum of two (2) U.S. based high-medium or large size PHAs with housing units between 500 to 9,999 as defined by the HUD, and actively utilizing the offeror's product as their primary platform.

2. Payments

The HPHA shall compensate the Successful Offeror in accordance with the accepted proposal. Any requirements for advance payment must conform to the common business practice for making such payments as determined by the HPHA and in accordance with section 40-57, HRS.

Compensation shall be paid in accordance with and subject to the following:

a. The Successful Offeror shall submit an invoice for services rendered under each Contract separately.

   i. Services rendered for the As-Needed Sandbox Contract are billable for the month(s) that the Sandbox is being used.

   ii. Services rendered for the Software Platform Licenses Contract are billable to the extent that the licenses are active.

b. Pursuant to section 103-10, HRS, the HPHA shall have 30 calendar days after receipt of a proper invoice and satisfactory delivery of goods or performance of the services to make payment or as allowable in accordance with section 40-57, HRS. Upon receipt of the invoice, the HPHA shall date stamp the invoice, and use this receipt date to calculate that 30-day payment period. For the purposes of this paragraph, the Successful Offer's invoice date shall not be considered.

   For this reason, the HPHA will reject any offers submitted with a condition requiring payment within a shorter period. Further, the HPHA will reject any offers submitted with a condition requiring interest payments greater than that allowed by section 103-10, HRS, as amended.

c. The Successful Offeror shall submit original invoice(s) to:

   Hawaii Public Housing Authority
   Information and Technology Office
   1002 N. School Street
   P.O. Box 17907
   Honolulu, Hawaii 96817
d. All invoices shall reference the Contract number assigned to the Contract. Payment shall be made in accordance with section 103-10, HRS, upon certification by the Contract Administrator that the Successful Offeror has satisfactorily rendered the goods/services specified or as allowable in accordance with section 40-57, HRS.

e. Invoice(s) shall be itemized to include without limitation description of goods/services and performance period.

f. Invoice(s) for the month of June shall be submitted to the HPHA by the 20th of June for work performed for the period from June 1st to June 15th for payment processing in order to comply with the HPHA fiscal year-end close out process. For work performed for the period from June 16th to June 30th, the invoice shall be submitted to the HPHA not later than July 15th for payment processing.

g. The HPHA may submit monitoring report(s) to the Successful Offeror listing any discrepancies or Contract violation(s) requiring correction. These discrepancies or Contract violation(s) must be addressed timely as agreed to by both parties to avoid delays in payment issuance or for payment adjustment purposes.

h. For final payment, the Successful Offeror must submit a valid tax clearance certificate. A valid tax clearance certificate shall be dated not more than two (2) months from the last approval date with an original green certified copy stamp. A valid Hawaii Compliance Express Certificate of Vendor Compliance in lieu of the tax clearance certificate is acceptable.

(END OF SECTION)
Section 3
Proposal Forms and Instructions

I. General Instructions

By submission of a proposal, the offeror certifies that the proposal is 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.

Offerors shall ensure compliance with all requirements of the RFP. Failure to comply with any of the RFP requirements may result in automatic disqualification of their proposal.

The submission of a proposal shall 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 to the offer related to performance requirements of the work.

An offeror shall submit one (1) original proposal marked "ORIGINAL", four (4) copies of the proposal marked "COPY", and five (5) USB drives to include the Technical Requirements Matrix and Demo Videos. It is imperative that the offeror submit only one (1) original proposal and the required number of copies. The outer envelope or packaging of the proposals shall be sealed and clearly marked with the RFP number and title, the offeror's name, address, telephone, fax number, and address it to the attention of the RFP Coordinator.

All corrections to a proposal shall be legible and initialed in ink by the offeror's authorized person signing the proposal. Any illegible or otherwise unrecognizable corrections or initials on the proposal may result in a rejection of the proposal.

Prior to submission of a proposal, each offeror must:

A. Thoroughly examine the solicitation documents. Solicitation documents include this RFP, all RFP attachments, RFP addendums, and any other relevant documentation.

B. Be familiar with local, State, and Federal laws, ordinances, rules and regulations that may in any manner affect cost, progress, or performance of the work to be performed.
Proposals shall be submitted to the HPHA in the prescribed format outlined in this RFP. A written response is required for each item unless indicated otherwise.

No supplemental literature, brochures or other unsolicited information should be included in the proposal packet.

II. Proposal Forms

A. The proposal forms/documents must be completed and submitted to the HPHA by the required due date and time, and in the format prescribed by the HPHA. Electronic mail submissions shall not be accepted. See Attachment 11 for Proposal Submittal Checklist.

B. Offerors shall submit its proposal under the offeror's exact legal name that is registered with the State of Hawaii's Department of Commerce and Consumer Affairs and shall indicate this exact legal name. Failure to do so may delay proper execution of the Contract.

C. Offeror's authorized signature shall be an original signature in ink. If the proposal is not signed by an authorized representative as submitted on the corporate resolution or the affixed signature is a photocopy, the proposal may be rejected unless waived by the HPHA pursuant to section 3-122-31(c)(1)(B), HAR.

D. A proposal security deposit is not required for this RFP.

F. Include the offeror's organization, RFP identification information, titles/subtitles, and numerical outline information on the top right hand corner of each page of the proposal.

G. Include consecutive page numbering on the proposal, which should begin with page one and end with the last numbered page of the complete proposal.

H. Proposals must be bounded and tabbed by sections.

III. Proposal Application:

Listed below are the sections that must be included in the offeror's proposal. Each section must be clearly labeled and shall be assembled in the order described herein.
Offerors must compile proposals using the following outline:

1. Transmittal Letter
2. Table of Contents
3. Background and Summary
4. Experience and Capabilities
5. Service Delivery
6. Price Proposal
7. Other

A. Transmittal Letter

The Transmittal Letter shall be in the form of a standard business letter on official business letterhead and signed by an authorized representative. See Attachment 12.

The Transmittal Letter must include:

1. A statement indicating that the Offeror is a corporation or other legal entity and the federal and state taxpayer identification number of the legal entity.
2. A statement that the Offeror is or will be registered to do business in Hawaii and will obtain a Federal Tax License and State General Excise Tax License before commencement of work.
3. A statement declaring the Offeror is not in violation of Chapter 84, HRS, concerning prohibited State contracts.
4. A statement certifying that the price(s) submitted by the Offeror was/were independently arrived at without collusion.
5. A statement acknowledging and identifying that all addenda to this RFP issued by the HPHA have been received by the Offeror. If no addenda have been received, a statement to that effect should be included. Alternatively, complete and submit the Acknowledgement of Addenda form with the proposal. See Attachment 2.
6. A statement authorizing the HPHA to verify information provided in the interested offeror’s proposal.

B. Background and Summary

This section shall clearly and concisely summarize and highlight the contents of the proposal in such a way as to provide the HPHA with a broad understanding of the entire proposal. Include a brief description of the Offerors’ philosophy and overall approach to the product/services offered,
brief description of the offeror’s organization, goals and objectives related to
the services offered, and how the proposed service is designed to meet the
needs identified in this solicitation.

C. Experience and Capabilities

This section shall describe the Offeror’s experience and capabilities of the
product/services offered. Offeror shall be required to have been in
business for five (5) or more years with minimum experience of three (3)
years in software development. Include the following in this section:

1. Describe offeror’s experience and capabilities related to the
   proposed product/services.

2. Number of years in business and number of years performing
   similar services specified in this solicitation.

3. Provide a client listing consisting of high-medium to large size
   Public Housing Authorities serviced within the last 12-month period
   and specify the number of housing units and Housing Choice
   Vouchers for each. High-medium to large size PHAs should have
   between 500 to 9,999 housing units as defined by HUD.

4. Provide names, titles, organizations, telephone numbers, email
   addresses, and mailing addresses of at least two (2) references
   from the offeror’s client listing that may be contacted by the HPHA
   related to the offeror’s past and current performance.

5. Litigation Disclosure

   Disclose any litigation, either pending, on-going or completed,
   between your firm and any current or former clients during the last
   five (5) years immediately prior to the deadline for receipt of
   proposals.

6. Complete the Technical Requirements Matrix in Excel format on an
   USB Drive. See Attachment 13.

   Offerors shall utilize the Technical Requirements Matrix as provided
   in Attachment 13, in Excel format, to indicate the level of efforts
   required for the software platform to meet the technical
   requirements listed on the matrix. Offerors may contact the RFP
   Coordinator to request for the Technical Requirements Matrix via
   electric mail if offeror is unable to download it from the State
   Procurement Office Hawaii Awards and Notices Data System
   (HANDS) or the HPHA website.
Offerors shall submit the matrix using the Technical Requirements Matrix as prescribed in this RFP. Do not alter the technical requirements listed on the matrix. Offers submitted with alterations made to the matrix or with re-created forms may be rejected and deemed non-responsive.

For each line item in the matrix, offerors shall indicate the level of effort to meet each requirement using the following scale:

- **Out-of-box (OoB):** No configuration is necessary to meet this requirement.

- **Point-and-click:** the requirement can be accomplished through point-and-click configuration of the solution.

- **Programmatic:** the requirement can be accomplished through programmatic customizations of the solution by software engineers.

- **Requires 3rd party:** requirement can be accomplished through integrations with additional SaaS providers. When indicating this option, please provide one or more recommended vendors.

- **Not supported:** this use case or requirement is not supported by the Offeror.

To complete the matrix, place and “x” in the appropriate column for each requirement as shown below:

<table>
<thead>
<tr>
<th>Out-of-box</th>
<th>Point-&amp;-click</th>
<th>Programmatic</th>
<th>3rd party service</th>
<th>Not Supported</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>x</td>
<td>x</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>x</td>
<td></td>
<td>x</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>x</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>x</td>
</tr>
<tr>
<td>x</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

There are requirements/line items that may require a numeric entry, binary Yes/No, or brief written response. These requirements are
indicated by a single grey cell blocking the effort scale (columns C through G), and a highlighted cell in a column with the text “Response here...”, as show below:

The image below shows an example of a matrix with each type of completed response:

7. Provide product demonstration video(s) in video format on an USB Drive. Multiple videos may be submitted to demonstrate functionalities of the software platform. Offeror shall provide narrative to explain how each feature was implemented in plain language with specific steps and required software. Demo video(s) shall not exceed a total of 20 minutes in length.

The demo requirements are as follows:

a) Dashboard

1) Show dashboard and how to drill in to filter for occupancy, vacancy, delinquency, demographic data, etc.

2) Show us how to create a custom report/HUD required scoring reports (e.g. unit turnover, occupancy, or PHAS).
b) User Interface & Ease-of-Use

1) Show us how an administrator can add custom tooltips to help internal users with onboarding.

2) Show us how to send an email to residents of a particular property, with "email" set as their default communication preference. How an email template can be viewed and customized before sending.

c) Managing Process Workflows

Show us how the 50058, annual recertification is handled and process, to include information tracking, form submission and approval.

d) Customer Service Ticketing

1) Show us the different ways a resident can initiate a service ticket.

2) Show us the communication options available to both the resident and the HPHA.

3) Show us how approvals for individual steps that make up a request are accomplished, visualized, and tracked.

4) Show us how additional approval routes or steps can be added to an existing ticket.

e) Financial

Show us how checks are processed and printed for Section 8 and utility allowance credits.

D. Service Delivery

Describe migration and transition workflows options and potential associated costs. Elaborate on available training materials and procedures. Provide narrative to include a timeline and description of all service deliverables. Specify all services that are included in the license fee (i.e. sandbox/testing environment, ongoing updates, feature enhancements).
Note that implementation and customization of the platform is not a requirement and is excluded in this solicitation. A separate solicitation will be issued for implementation and customization services.

E. Price Proposal

The Successful Offeror shall pay the State of Hawaii general excise tax and all other applicable taxes. The price proposal shall include two price components:

1. All-inclusive monthly fee for use of the sandbox; and

2. All-inclusive annual license fee for the cloud-based software platform. Offers.

Indicate all payment terms in the proposal to include billing frequency and pre-payment requirements as applicable.

See Attachment 3 for Sample Price Proposal.

F. Other

Offerors will also submit the following with his/her proposal application:

1. Signed Wage Certificate to demonstrate compliance with section 103D-55, HRS.

2. Acknowledgement of Addenda

3. Certification and Representations of Offerors (HUD Form 5369-C).

4. Corporate Resolution indicating authorized signer for proposals and contractual documents on behalf of the Offeror.

Failure to submit the above documents at the time of proposal submission may be cause to reject the Offeror’s proposal.

(END OF SECTION)
Section 4
Proposal Evaluation & Award

I. Proposal Evaluation

An evaluation committee approved by the HPHA Executive Director or designee will evaluate all proposals received. The evaluation of such proposals will be based solely on the evaluation criteria set forth in this RFP. The evaluation committee’s primary responsibility shall be to review the technical aspects of the proposals submitted.

Each proposal will be reviewed for overall compliance with the RFP requirements and will be scored based on a total possible of 100 points. The evaluation criteria are as follows:

<table>
<thead>
<tr>
<th>Evaluation Criteria</th>
<th>Total Possible Points</th>
</tr>
</thead>
<tbody>
<tr>
<td>Mandatory Requirements</td>
<td>Pass or Rejected</td>
</tr>
<tr>
<td>A. Background and Summary</td>
<td>5 points</td>
</tr>
<tr>
<td>1) Background of company.</td>
<td></td>
</tr>
<tr>
<td>2) Vision of proposed services meeting needs of the solicitation.</td>
<td></td>
</tr>
<tr>
<td>B. Experience and Capabilities</td>
<td>60 points</td>
</tr>
<tr>
<td>1) Extent to which the Offeror clearly demonstrates experience and knowledge to provide the proposed services.</td>
<td></td>
</tr>
<tr>
<td>2) Extent to which the Offeror clearly demonstrates having successfully performed the proposed services.</td>
<td></td>
</tr>
<tr>
<td>3) Technical Requirements Matrix:</td>
<td></td>
</tr>
<tr>
<td>a) Demonstrate ease-of-use and administration.</td>
<td></td>
</tr>
<tr>
<td>b) Demonstrates speed and ease of configuration for implementation.</td>
<td></td>
</tr>
<tr>
<td>c) Extent the proposed software platform is extensible to allow client to build upon the platform and modify it internally with low or no code.</td>
<td></td>
</tr>
<tr>
<td>4) Product Demonstration:</td>
<td></td>
</tr>
<tr>
<td>a) Demo video(s) include narrative indicating specific steps and software requirements.</td>
<td></td>
</tr>
<tr>
<td>b) Extent the demo video(s) clearly and concisely illustrate how the features were implemented.</td>
<td></td>
</tr>
</tbody>
</table>
### C. Service Delivery

<table>
<thead>
<tr>
<th></th>
<th>20 points</th>
</tr>
</thead>
<tbody>
<tr>
<td>1) Migration and workflow transition options are practicable.</td>
<td></td>
</tr>
<tr>
<td>2) Extent to which the Offeror provides training materials and procedures.</td>
<td></td>
</tr>
<tr>
<td>3) Potential associated costs for migration and transition appear reasonable.</td>
<td></td>
</tr>
<tr>
<td>4) Proposed timeline for the services is reasonable.</td>
<td></td>
</tr>
<tr>
<td>5) Deliverables/services included with the license fee are desirable.</td>
<td></td>
</tr>
</tbody>
</table>

### D. Cost Reasonableness

<table>
<thead>
<tr>
<th></th>
<th>5 points</th>
</tr>
</thead>
<tbody>
<tr>
<td>1) Reasonableness of the offeror’s price for the Sandbox.</td>
<td></td>
</tr>
<tr>
<td>2) Reasonableness of the offeror’s price for the annual software platform licenses.</td>
<td></td>
</tr>
</tbody>
</table>

### E. Price Proposal

Price Proposal with lowest cost factor will receive 10 points. Each proposal that has a higher cost factor than the lowest cost factor proposal must have a lower rating.

<table>
<thead>
<tr>
<th></th>
<th>10 points</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total</td>
<td>100 points</td>
</tr>
</tbody>
</table>

Proposals shall 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 HPHA shall not be required to hold discussions with offerors who submitted unacceptable proposals.

Discussion may be conducted with priority listed offerors who submit proposals determined to be acceptable or potentially acceptable of being selected for award. Proposals may also be accepted without discussions. The objective of these discussions is to clarify issues regarding the offeror’s proposal before the best and final offer, if necessary.

The HPHA reserves the right to make no award should it believe that none of the offerors will be capable of delivering the necessary level of services within an acceptable price range and/or time period.
II. Mandatory Requirements

Proposals shall be prepared in accordance with the instructions provided in this RFP and shall meet all requirements set forth in this RFP. Proposals shall be in the format as prescribed by this solicitation and shall contain a response to each of the sections identified in the evaluation criteria for award. Proposals will be reviewed to ensure submittal of all required attachments, certifications, forms, and narrative sections.

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

III. Technical Review

Proposals will be evaluated for technical and contractual acceptability. The technical review will be evaluated to determine if the Offeror possesses the capability to successfully perform the requirements of the solicitation. The technical criteria are as follows:

1. Background and Summary;
2. Experience and Capability; and

Successful Offeror shall produce documents to demonstrate compliance with section 3-122-112, HAR, Responsibility of Offerors.

IV. Price Proposal Review

The price proposal review will be evaluated for financial and contractual acceptability and for reasonableness of the price proposal. The proposal with the lowest cost factor shall receive the highest available rating. Each proposal that has a higher cost factor must have a lower rating than the lowest priced proposal.

The points allocated to higher priced proposals must be equal to the lowest cost factor proposal price multiplied by the maximum points available for the price proposal evaluation criteria, divided by the price of the proposal being evaluated as follows:

$$\text{Price of the lowest price proposal} \times 10$$

Price of the proposal being evaluated

In determining whether a proposal is reasonable, the HPHA will evaluate the price against an independent cost estimate and all proposals received.
V. Method of Award

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

All proposals will be reviewed for reasonableness. Offers that are not within the competitive range will be notified that their proposals are unacceptable, negotiations/discussions are not contemplated, and any revisions to the proposals will not be considered.

Award will be made to the responsible offeror whose proposal conforms to the solicitation requirements and determined most advantageous to the HPHA with consideration to price and other factors indicated herein.

Pursuant to Chapter 3-122-59 HAR, if for a given request for proposals, there is only one responsible offeror submitting an acceptable proposal, an award may be made to the single offeror, rejected and a new request for proposals may be solicited if certain conditions are not met; the proposed solicitation maybe cancelled, or an alternative procurement method may be conducted.

The HPHA 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 shall be cause for rejection. Proposals should be submitted initially on the most favorable terms of a price and technical standpoint, which the offeror can submit to the HPHA.

(END OF SECTION)
## Section 5
**Attachments**

<table>
<thead>
<tr>
<th></th>
<th>Description</th>
<th>Due Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Wage Certificate</td>
<td>Due March 4, 2021</td>
</tr>
<tr>
<td>2</td>
<td>Acknowledgement of Addenda</td>
<td>Due March 4, 2021</td>
</tr>
<tr>
<td>3</td>
<td>Sample Price Proposal</td>
<td>For Information Only</td>
</tr>
<tr>
<td>4</td>
<td>Sample Contract for Cloud-Based Software Platform Sandbox</td>
<td>For Information Only</td>
</tr>
<tr>
<td>5</td>
<td>Sample Contract for Cloud-Based Software Platform License</td>
<td>For Information Only</td>
</tr>
<tr>
<td>6</td>
<td>General Conditions, State AG-008 103D</td>
<td>For Information Only</td>
</tr>
<tr>
<td>7</td>
<td>General Conditions, Federal Form HUD 5370-C</td>
<td>For Information Only</td>
</tr>
<tr>
<td>8</td>
<td>Instructions to Offerors, Form HUD 5369-B</td>
<td>For Information Only</td>
</tr>
<tr>
<td>9</td>
<td>Certification and Representation of Offerors Form HUD 5369-C</td>
<td>For Information Only</td>
</tr>
<tr>
<td>10</td>
<td>Hawaii State Government Holiday Schedule</td>
<td>For Information Only</td>
</tr>
<tr>
<td>11</td>
<td>Proposal Submittal Checklist</td>
<td>For Information Only</td>
</tr>
<tr>
<td>12</td>
<td>Sample Transmittal Letter</td>
<td>For Information Only</td>
</tr>
<tr>
<td>13</td>
<td>Technical Requirements Matrix on Excel Format</td>
<td>Due March 4, 2021</td>
</tr>
</tbody>
</table>

(END OF SECTION)