

PROPOSAL SUBMITTAL CHECKLIST

RFP No. BOT 2023-005

INDEPENDENT BOARD INVESTMENT CONSULTANT FOR THE OFFICE OF HAWAIIAN AFFAIRS' NATIVE HAWAIIAN TRUST FUND

The following checklist is provided as a reference for proposal submittal. The offeror shall be responsible for complying with all aspects of proposal submission requirements. See the RFP for more information regarding each item. The OHA shall not be responsible for other pertinent RFP information not listed below:

- 1. Attachment 3 - Cover Letter (original signature required).
- 2. Proposal
 - a. Finance Related Requirements
 - b. Qualifications and Requirements pertaining to the Scope of Services, if any
 - c. Hawaii Compliance Express Certificate of Vendor Compliance OR
 - Department of Labor and Industrial Relations, Certificate of Compliance with section 3-122-112, HAR, Form LIR #27; AND
 - Department of Consumer and Commerce Affairs Certificate of Good Standing; AND
 - State and Federal Tax Clearance Certificates.
 - d. Corporate Resolution indicating authorized signer for proposal and contractual documents
- 3. Attachment 4 – Acknowledgement of Addendum
- 4. Attachment 5 – Wage Certificate
- 5. Attachment 6 – Offer Form OF-1 and OF-2

RFP REGISTRATION FORM

RFP No. BOT 2023-005	INDEPENDENT BOARD INVESTMENT CONSULTANT FOR THE OFFICE OF HAWAIIAN AFFAIRS' NATIVE HAWAIIAN TRUST FUND
----------------------	---

INSTRUCTIONS: If you are interested in submitting a proposal, please complete this Registration Form and e-mail this form to the RFP Coordinator: proposals@oha.org.

Registration Forms Due	Due by Monday, August 29, 2022
Pre-Proposal Conference	Monday, August 29, 2022, at 2:30 p.m. HST Individuals or firms are strongly encouraged to attend the Pre-Proposal Conference that will be held on Monday, August 29, 2022, at 2:30 p.m. Hawai'i Standard Time (hereinafter "HST"). Please RSVP to Proposals@OHA.org by 2:30 p.m. HST, Monday, August 29, 2022, if you will be attending the Pre-Proposal Conference.
Proposal Submittals Due	Due by Monday, September 26, 2022, by 2:00 p.m. HST Proposals shall be submitted through the HIePRO website and/or via e-mail to proposals@oha.org . If submitting via e-mail, the official time will be that which the email is received by the OHA.
Notice of Award	No later than October 31, 2022
Contract Start Date	Thursday, December 1, 2022
<p style="text-align: right;">Date: _____</p> <p>Company: _____</p> <p>Address: _____</p> <p>Phone: _____ E-mail: _____</p> <p>Contact Person: _____</p>	

YOUR BUSINESS LETTERHEAD
Aloha Company • 123 Aloha ‘Oe Drive • Honolulu, HI 96819

TO: Sylvia M. Hussey, Ed.D
Ka Pouhana, Chief Executive Officer, Head of Purchasing Agency
Office of Hawaiian Affairs
560 North Nimitz Highway Suite 200
Honolulu, Hawai‘i 96817

Dear Ms. Hussey:

The undersigned has carefully read and understands the terms and conditions specified in the RFP BOT 2023-005 and in the General Conditions, and hereby submits the following Proposal to perform the work specified herein, all in accordance with the true intent and meaning thereof.

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

Furthermore, Aloha Company is a Domestic Profit Corporation registered to do business in the State of Hawai‘i. Please see the Federal taxpayer identification number and State General Excise Tax License Identification number indicated below.

Date: _____ Respectfully submitted,

Phone: _____

Remittance Address, if different from Business Address _____

Hawai‘i General Excise Tax License I.D. No: _____

Federal Tax I.D./Social Security No: _____

_____ Exact Legal Name of Company (Offeror)

_____ Authorized Signature (Original)

Print Name: _____

Title: _____

Business Address: _____

_____ E-mail: _____

ACKNOWLEDGEMENT OF ADDENDA

RFP No. BOT 2023-005

**INDEPENDENT BOARD INVESTMENT CONSULTANT
FOR THE OFFICE OF HAWAIIAN AFFAIRS’
NATIVE HAWAIIAN TRUST FUND**

The offeror has received the following Addenda, receipt of which is hereby acknowledged:

Addendum Number: _____ Date Received: _____

Addendum Number: _____ Date Received: _____

Addendum Number: _____ Date Received: _____

Addendum Number: _____ Date Received: _____

Addendum Number: _____ Date Received: _____

No Addenda were posted.

Offeror’s Name

Authorized Signature (Original)

Print Authorized Signature Name

WAGE CERTIFICATE

DESCRIPTION OF PROJECT

**INDEPENDENT BOARD INVESTMENT CONSULTANT
FOR THE OFFICE OF HAWAIIAN AFFAIRS'
NATIVE HAWAIIAN TRUST FUND**

Pursuant to Section 103-55, Hawai'i Revised Statutes (HRS), I hereby certify that if awarded the contract and it is in excess of \$25,000.00 the services will be performed under the following conditions:

1. The services shall be performed by employees at wages or salaries not less than wages or salaries paid to public officers and employees doing similar work; and
2. All applicable laws of the Federal and State governments relating to worker's compensation, unemployment compensation, payment of wages, and safety will be fully complied with.

I understand that all payments required by Federal and State laws to be made by employers for the benefit of their employees are to be paid in addition to the base wages required by Section 103-55, HRS.

BY: _____
Signature of Person Authorized to Signer

Please Print

NAME: _____

TITLE: _____

VENDOR: _____

DATE: _____

OFFER FORM, OF-1

TO: Sylvia M. Hussey, Ed. D
Ka Pouhana, Chief Executive Officer, Head of Purchasing Agency
Office of Hawaiian Affairs, State of Hawai‘i
560 N. Nimitz Highway, Suite 200
Honolulu, Hawai‘i 96817

RE: OFFICE OF HAWAIIAN AFFAIRS, STATE OF HAWAI‘I
RFP NO. BOT 2023-005 - INDEPENDENT BOARD INVESTMENT CONSULTANT FOR
THE OFFICE OF HAWAIIAN AFFAIRS’ NATIVE HAWAIIAN TRUST FUND

Dear Ms. Hussey,

The undersigned has carefully read and understands the terms and conditions specified in the Specifications and Special Provisions attached hereto, and in the General Conditions, by reference made a part hereof and available upon request; and hereby submits the following offer to perform the work specified herein, all in accordance with the true intent and meaning thereof. The undersigned further understands and agrees that by submitting this offer, 1) he/she is declaring his/her offer is not in violation of Chapter 84, Hawai‘i Revised Statutes, concerning prohibited State contracts, and 2) he/she is certifying that the price(s) submitted was (were) independently arrived at without collusion.

Offeror is:

Sole Proprietor Partnership *Corporation Joint Venture

*State of incorporation: _____

Other _____

Hawai‘i General Excise Tax License I.D. No. _____

Federal I.D. No. _____

OFFER FORM, OF-1
(CONTINUED)

Payment address (other than street address below):

Business address (street address):

Respectfully submitted:

Exact Legal Name of Company (Offeror)**

Authorized (Original) Signature

Name & Title: _____

Date: _____

Telephone No.: _____

Fax No.: _____

E-mail Address: _____

**If Offeror is a “dba” or a “division” of a corporation, furnish the exact legal name of the corporation under which the awarded contract will be executed:

OFFER FORM, OF-2

Flat Fixed Fee Monthly Amount	\$ _____
Hourly Rate (Partner, if applicable)	\$ _____
Monthly Hours (Partner, if applicable)	_____
Hourly Rate (Manager, if applicable)	\$ _____
Monthly Hours (Manager, if applicable)	_____
Hourly Rate (Associate, if applicable)	\$ _____
Monthly Hours (Associate, if applicable)	_____
Hourly Rate (Other, if applicable)	\$ _____
Monthly Hours (Other, if applicable)	_____
Total Cost	\$ _____

Note:

Pricing shall include labor, materials, supplies, all applicable taxes, and any other costs incurred to provide the specified services.

The Contract for the proposed services may be extended without the necessity of re-soliciting or solicitation, subject to appropriation and availability of funds to OHA, continued need for the services, and OHA’s determination of satisfactory performance of the contracted organization, or unless this Contract is terminated. The option to extend the service shall be offered in writing by OHA prior to the expiration of the Contract. No Contract or amendment to a Contract shall be binding upon OHA until the Contract has been fully and properly executed by all parties thereto prior to the start date of the Contract. The contracted organization shall not provide any services until the Contract is fully and properly executed.

Offeror

Name of Company