

STATE OF HAWAI‘I
OFFICE OF HAWAIIAN AFFAIRS

NOTICE TO PROVIDERS OF PROFESSIONAL SERVICES

PS No. EXEC 2019-16

In accordance with §103D-304, HRS, the State of Hawai‘i, Office of Hawaiian Affairs (hereinafter “OHA”), is seeking qualified individual or firms engaged in providing professional services under the category of GS-0505 Financial Management Series to provide services to further assist the OHA in their achievement of fulfilling their Fiscal Sustainability Plan (hereinafter “FSP”).

The term of the contract shall commence on January 1, 2019 until services are no longer necessary. Deadline to submit your sealed Statement of Qualifications (hereinafter “SOQ”) is **Monday, November 26, 2018, 2:00 p.m. Hawaii Standard Time (hereinafter “HST”).**

BACKGROUND

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

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

A FSP was provided to the OHA after reviewing and analyzing OHA’s financial and budgeting data in order to assist OHA achieve its strategic priorities and goals for the purpose of ensuring OHA’s services and programs are consistently available and delivered to OHA’s lāhui (nation, race).

SCOPE OF WORK

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

- A. Continued implementation of OHA’s Fiscal Sustainability Plan which includes the five (5) working groups:

1. Department of Hawaiian Home Lands (hereinafter “DHHL”)

Resolve issues with the Memorandum of Agreement between the OHA and DHHL, identify likely scenarios to refinance the annual cash payment obligation and formulate recommendations for proactive action, if necessary.

2. Legal and Taxable Structure (LLCs);

Assess the benefits and shortcomings of a commercial property LLC and prepare recommendations to the OHA Board of Trustees

3. Pension Benefit;

Verify the accuracy of the OHA’s pension liability and conduct discussions with the State’s Department of Budget and Finance and the Employees’ Retirement System to adjust any discrepancies and determine if the OHA can moderate the pace of future increases.

4. Spending Policy; and

- a. Develop and improve fiscal policies to align with FSP Implementation Plan, i.e. Fiscal Reserve, Spending Policy, Debt Consideration, and or other
- b. Assist the OHA with wealth strategies for consistency with the R FSP.

5. Real Estate.

Assist the OHA in evaluating the financial impact under the likely scenarios and formulate recommendations for proactive action, if necessary.

- B. Work with the OHA to ensure the OHA’s new Strategic Plan has achievable priorities and results;
- C. Assist the OHA in providing valuable expertise and support in managing their investments; and
- D. Work with the OHA to ensure the OHA’s services and programs are consistently available and deliverable to our lāhui through fiscally responsible and sustainable spending

SUBMITTAL REQUIREMENTS

Individuals or firms interested in being considered for the above service contract and who have the necessary qualifications and resources are invited to submit a SOQ. SOQs shall be clear and concise. Only those prospective individuals or firms whose SOQs are submitted by the **Monday, November 26, 2018, 2:00 p.m. Hawaii Standard Time (hereinafter “HST”)** will be considered.

Interested individuals or firms shall provide/demonstrate experience in the areas listed in the scope of services. Submittals must also include the following information:

1. The name of the firm or person, the principal place of business, and location of all its offices;
2. The age of the firm and its average number of employees over the past three (3) years;
3. The education, training, and qualifications of key members of the firm;
4. The names and phone numbers of up to five clients who may be contacted, including at least two for whom services were rendered during the preceding year; and
5. Any promotional or descriptive literature which the firm desires to submit (referring to the firm's website in lieu of submitting a hard copy is not acceptable).

Any SOQ proposal packet that does not contain the requirements- above and/or not properly sealed or submitted via email or facsimile shall be automatically rejected.

The Notice to Providers of Professional Services may be picked up at the OHA Procurement Unit located at 560 North Nimitz Highway, Suite 200, Honolulu, Hawai'i, 96701, or downloaded at the OHA website at www.oha.org or at the SPO website <https://hands.ehawaii.gov/hands/opportunities> beginning November 13, 2018.

Submission of sealed SOQs shall be received at the OHA's Reception Desk, 560 North Nimitz Highway, Suite 200, Honolulu, Hawai'i, 96701 no later than Monday, November 26, 2018, 2:00 p.m. HST. Electronic mail and facsimile transmission **shall not** be accepted. The official time shall be that which is recorded on the time stamp clock of the OHA for all delivered submittals. Deliveries by private mail services, such as Federal Express, shall be considered hand deliveries. All mail-in submittals delivered/postmarked by the United States Postal Service **must be received no** later than Monday, November 26, 2018, 2:00 p.m. HST.

The OHA reserves the right to reject any and all submission and to accept the submittals in whole or in part in the best interest of the OHA. Questions related to this solicitation shall be directed to Charmaine Matsuura at (808) 594-0273.

The **packet must be sealed and labeled** to:

SOQ: PS No. EXEC 2019-16

Charmaine Matsuura
Procurement Specialist
Office of Hawaiian Affairs
560 North Nimitz Highway, Suite 200
Honolulu, Hawai'i 96817

Please send an email to charmainem@oha.org to confirm that your firm is interested in submitting a SOQ. This email confirmation will only be used to contact interested firms in the event that changes are made and are not required for, or part of, the evaluation process.

If you have any questions, please contact Charmaine Matsuura at (808) 594-0273, Procurement Unit or email charmainem@oha.org.