

Request for Proposals (RFP)

Hawaii Road Usage Charge (HiRUC)
Demonstration Project

Automated Demonstration Service Provider

June 5, 2019





RFP – HiRUC Demonstration Project – Automated Demonstration Service Provider

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Preface

In 2018, the Hawaii Department of Transportation's (HDOT) launched the HiRUC (Hawaii Road Usage Charge) Demonstration project. The HiRUC Demonstration project is a state-wide project to research RUC as a potential replacement for the current state fuel taxes and potentially county gas taxes as a road funding source.

D'Artagnan is implementing the HiRUC demonstration project. This project includes two parts:

- ▶ Part 1, Manual Demonstration, based on odometer readings taken during safety inspections, in which hundreds of thousands of Hawaii residents will receive mock Driving Reports for their annual road usage charges; and
- ▶ Part 2, Automated Demonstration, in which 2,000 volunteer Participants will receive Road Usage Reports based on automated collection of mileage data. The subject of this RFP is the procurement of a Service Provider to provide account management services for Part 2, including mileage data collection, reporting, and customer service, as described in this document. Part 2 will utilize some components of the HiRUC system, the system currently being established for the Part 1 Manual Demonstration, as described in this document.

D'Artagnan serves as the turnkey contractor solely responsible to HDOT for providing all necessary services and technologies to successfully carry out the HiRUC Demonstration Project. This solicitation for proposals, and any resulting contracts for account management services, is a business-to-business procurement activity between D'Artagnan and interested providers. Neither HDOT nor the State of Hawaii is a party to any contract resulting from this procurement. Contractual privity will rest with D'Artagnan and the firm selected to provide account management services in support of the HiRUC Demonstration project.



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Glossary

The meanings of HiRUC Demonstration project specific terms and abbreviations used in this RFP are given in the following table.

Term	Definition
Automated	Using automated technology to measure distance traveled, referring to the second part of the HiRUC demonstration
ConOps	Concept of Operations
Demonstration Participant	A Demonstration Participant is an individual with a road-charge-liable vehicle who is recruited to participate in the HiRUC Demonstration project. Demonstration Participants will receive a report of their road usage charges incurred for their registered vehicles when they drive on the road network that consists of public and private.
Driving Report	The report of RUC and vehicle driving details that many Hawaii vehicle owners will receive in the Part 1 Demonstration
Road Usage Report	The report of RUC and vehicle driving details that the Demonstration Part 2 Participants will receive in the Part 2 Demonstration
GPS	Global Positioning Systems
HDOT	Hawaii Department of Transportation
HiRUC	Hawaii Road Usage Charge
HiRUC Administration	The staff administering the HiRUC Demonstration (D'Artagnan)
Manual	Requiring human activity to measure distance traveled
Mileage Reporting Method	Any means of measuring and reporting miles traveled for a given vehicle
OBDII	On Board Diagnostics II, the vehicle data port into which plug-in devices can be plugged
Operations	Operations for the Demonstration project include all activities performed during the 9-month duration of the live Demonstration from account set-up to account closure.
Participant	One of the ~2,000 volunteers who enrolls in the HiRUC Part 2 Automated Demonstration
PII	Personal Identifiable Information
RUC	Road Usage Charge



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Term	Definition
Service Provider (SP)	A firm that provides mileage reporting methods and account management services to Participants, and sends compiled data on all Participants to the HiRUC system and the HiRUC Administration.
Setup	Comprises all elements of becoming qualified to perform operations for the Demonstration, including testing of business systems, mileage reporting methods, and technologies. The setup does not include operations.
SRS	System Requirement Specification
STSFA	Surface Transportation System Funding Alternatives
Vendor	The terms “firm” and “vendor” have distinct definitions in this RFP. Firms that have been selected and are under contract with D'Artagnan will be referred to as vendors. Prior to achieving status as vendors, private sector entities will be referred to as firms or consortia.
VIN	Vehicle Identification Number
VMT	Vehicle Miles Traveled



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1 Background Information

1.1 History of HiRUC Demonstration Project Development

Over the past decade, the Hawaii Department of Transportation (HDOT) has proposed gas tax hikes, registration fee increases, and rental car surcharges in order to allow transportation funding to keep pace with needs in the face of flattening and declining fuel tax revenues caused by increases in vehicle fuel economy (new purchases of electric vehicles and high-MPG vehicles in Hawaii outpace the national average). Legislative concerns over continued rate increases led HDOT to investigate electric vehicle fees, distance-based charges, and other alternatives. HDOT undertook a feasibility study of road user charges in 2016. As a result of the study, HDOT sought and successfully secured a Surface Transportation System Funding Alternatives (STSFA) grant to further test road user fee concepts tailored to the state's unique geography and stakeholder environment through a demonstration project. The Hawaii Road Usage Charge (HiRUC) Demonstration project launched in August 2018.

HDOT contracted D'Artagnan in August 2018 to implement a turnkey system for the HiRUC demonstration project. This project includes two phases:

- ▶ Part 1, Manual Demonstration, based on odometer readings taken during safety inspections, in which hundreds of thousands of Hawaii residents will receive mock Driving Reports for the annual road usage charges; and
- ▶ Part 2, Automated Demonstration, in which 2,000 volunteer Participants will receive mock Road Usage Reports based on automated collection of mileage data. The subject of this RFP is the procurement of a Service Provider to provide account management services for Part 2, including mileage data collection, reporting, and customer service, as described below.

Note that these names (Manual Demonstration and Automated Demonstration) will be updated to more user-friendly names when they are shared with the public. These names are used consistently within this document.

1.2 Key HiRUC Demonstration Features

Based in part on Stakeholder Advisory Group input, the HiRUC Demonstration project will have the key features for Part 1 and Part 2 described below in this section. The services being procured by this RFP includes only support of Part 2. Information on Part 1 is provided for context only.

1.2.1 HiRUC Part 1 Technology and System Design

Hawaii requires all vehicles to undergo periodic inspections as a condition of registering the vehicle. New vehicles must receive an inspection within two years of purchase; all other vehicles must receive an inspection annually. Inspections include visual examination of vehicle safety features, testing of lights, brakes, and, among other things, recording the odometer reading. Several hundred licensed inspectors are located throughout the state; HDOT, through a private contractor, equips each inspector with an iPad to input data about each vehicle inspected, including the odometer reading.

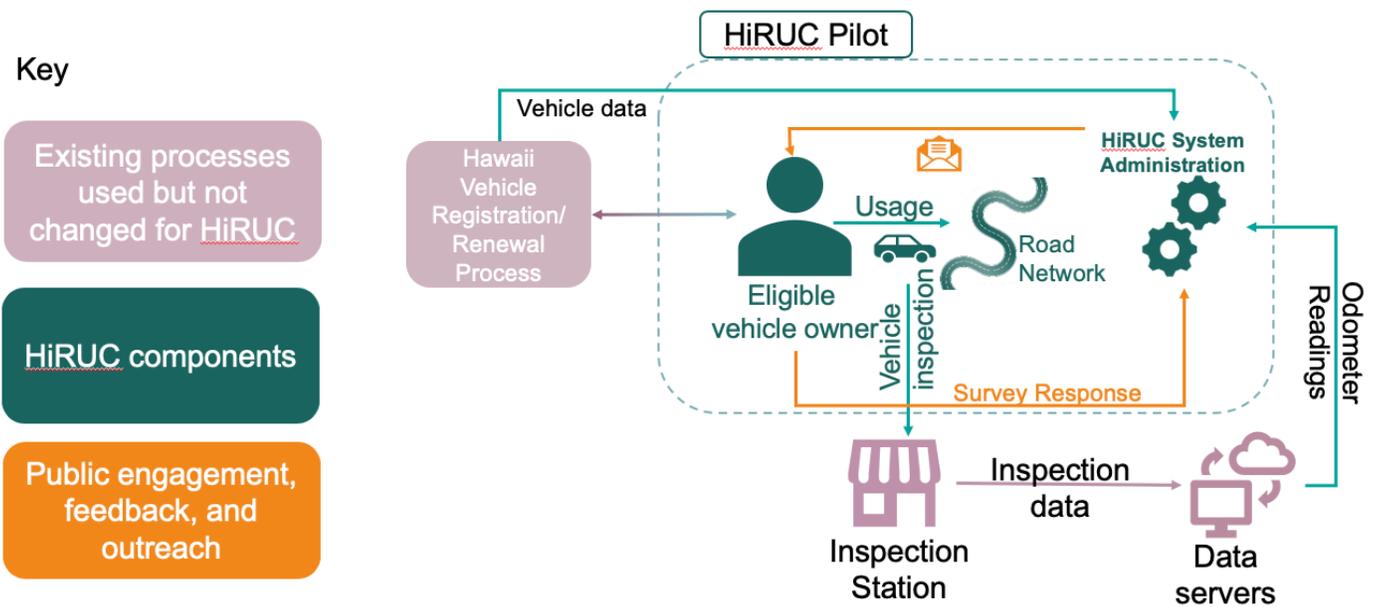


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In Part 1, vehicle owners will do nothing new or different to receive a Driving Report in the mail stating their road usage charges:

- ▶ Existing, operational systems will be leveraged for Part 1
 - > Periodic motor vehicle inspection (PMVI) database, including odometer readings
 - > Department of Motor Vehicles (DMV) vehicle registration database
- ▶ New components being developed for Part 1
 - > Datawarehouse to calculate miles driven by vehicle, based on external inputs (in Part 1, odometer readings from PMVI, in Part 2, from the Service Provider)
 - > Driving and Road Usage Report-generating software
 - > Printing and mailing Driving Reports
 - > Survey data collection system

Figure 1: HiRUC Part 1 System Diagram



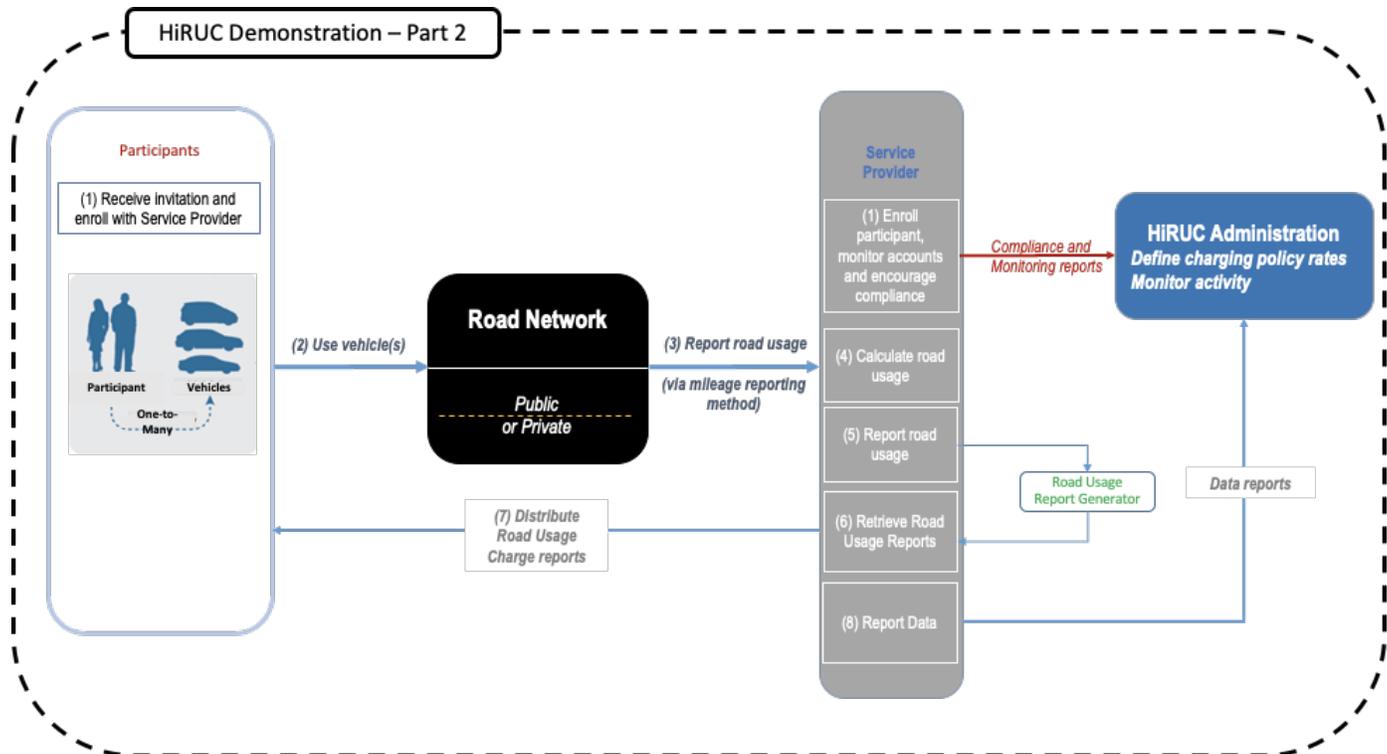
Note: Part 1, illustrated in this figure, is not part of this RFP



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1.2.2 HiRUC Part 2 Technology and System Design

Figure 2: HiRUC Part 2 Technology and System Diagram



In Part 2, volunteers will enroll with the Service Provider selected by D'Artagnan through this RFP, choose a mileage reporting method, and take the necessary actions for data to be reported from their vehicle.

- ▶ System Components developed for Part 1 that will be used in Part 2
 - > Datawarehouse to calculate miles driven by vehicle, based on external inputs (in part 2 mileage reported from technology provided by Service Provider)
 - > Road Usage Report-generating software
 - > Survey data collection system
- ▶ System components/processes for volunteers to experience automated mileage reporting as part of the demonstration (provision of these processes is the primary content of this RFP)
 - > Enrollment of Participants in Part 2
 - > Technology to report mileage
 - > Online account management feature to view account information and retrieve Road Usage Reports
 - > Customer service to Participants
 - > Reporting of Participant data, including mileage, to HiRUC system (the system currently being established for the Part 1 Manual Demonstration) and HiRUC Administration (D'Artagnan staff)



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2 RFP Objectives

This RFP for the HiRUC Demonstration will result in the selection of one Service Provider to deliver account management services and support viable and affordable mileage reporting methods for 2,000 enrolled Participants on schedule.

The live operational demonstration of Part 2 will last 9 months and will involve up to 2,200 Part 2 vehicles, all of which are registered in the state of Hawaii. Note that the intent is to have at least 2,000 vehicles for 9 months, so the HiRUC Administration will plan to over-enroll at the start of the program, with the intent to drop those Participants who have not begun reporting mileage within a reasonable time from the start of the demonstration.

The Service Provider's role will be to enroll up to 2,200 Part 2 Demonstration Participants in its account management system and to set up each vehicle with the mileage reporting method selected by the Participant. The Service Provider will provide account management to all Part 2 Demonstration Participants, including customer service, for the 9-month duration of the Demonstration. The Service Provider will also report data to the HiRUC system (the system currently being established for the Part 1 Manual Demonstration) via an interface specified in an Interface control document, and via a series of spreadsheet reports.



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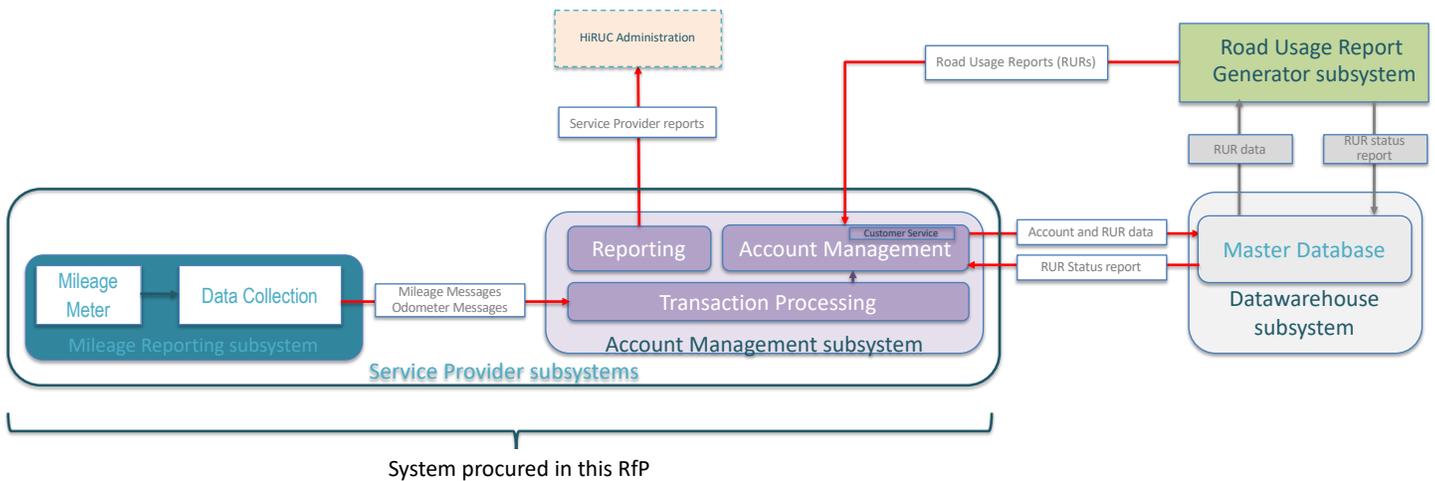
3 Required Demonstration Project Functions

3.1 Services Required to Support the Demonstration Project

The Service Provider will be required to integrate its systems with existing HiRUC Demonstration subsystems. The Service Provider will send account management and road usage charge data to the HiRUC system, the system currently being established for the Part 1 Manual Demonstration, which includes a Datawarehouse subsystem and a Road Usage Report Generator subsystem. The HiRUC Road Usage Report-generating subsystem will generate Road Usage Reports, statements of miles driven and notional costs (essentially a mock invoice) for each enrolled Participant and the Service Provider will be responsible for distributing the Road Usage Reports to Participants on the Participant’s online account and through other channels (email or text).

The diagram below shows the parts of the HiRUC system that will be procured in this RFP for the second part of the HiRUC Demonstration project. The Service Provider will be required to develop interfaces within its systems, and between its systems and existing HiRUC Demonstration subsystems as illustrated by the red arrows in the diagram below. Note that the MVerity System, indicated in the green box below, captures and processes odometer images, and will be supplied by Vehcon Inc. during the HiRUC Automated RUC Test Drive. The Service Provider will integrate with MVerity either by incorporating its software into its own app that end users can use to capture their odometer image (note that all apps must at a minimum support both iOS and Android), or by using the MVerity On Demand system, by which end users receive a text message with a link to a web page on which they can capture their odometer image

Figure 3: Service Provider systems procured in this RFP



After enrollment and for the duration of the Automated Demonstration, the Service Provider will serve as the primary point of contact with Participants. D’Artagnan will distribute the surveys to Participants and continue to be the point of contact for general feedback for the project including sending out periodic project e-newsletters. The Service Provider will offer ongoing account management services to Participants including customer services (phone and email-based customer service, and optionally text and/or chat-based customer service). The Service Provider will distribute mileage reporting methods (devices, apps, etc.) to Participants. The Service Provider will also distribute periodic Road Usage Reports to Participants. The PDF files for the Road Usage Reports will be generated by the existing HiRUC system (using data provided by the Service Provider).



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The Service Provider will receive secure links for each Road Usage Report, so the PDFs can be accessed securely on demand. If the Service Provider chooses to work with other technology providers to provide the plug-in device(s) or the Native Automaker telematics mileage reporting methods, the Service Provider will integrate the solutions of the technology providers so as to create a seamless end user experience.

The Demonstration project does not involve any real money payment collection or enforcement (although the Service Provider will encourage compliance among Participants).

3.2 Documentation of Technical Requirements

The remainder of this section provides a high-level overview of desired mileage reporting methods and technologies as well as account management services. Details are provided in the following six Exhibits to the RFP:

- ▶ A HiRUC Automated Demonstration (Part 2) *Concept of Operations document (ConOps)*, which provides an overview of the HiRUC Automated Demonstration Part 2 system from the motorist, agency, and account management perspectives (Exhibit B),
- ▶ A HiRUC Automated Demonstration (Part 2) *System Requirements Specification (SRS)*, which provides functional requirements for the system, and some more specific security and performance requirements (Exhibit C), and
- ▶ An HiRUC Automated Demonstration (Part 2) *Interface Control Document (ICD)*, which specifies a JSON/REST-based messaging interface between the various Demonstration entities (Exhibit D).
- ▶ A HiRUC Automated Demonstration (Part 2) *Business Rules Document (BRD)*, which specifies some aspects of business practices, including customer service (Exhibit E).
- ▶ Documentation of Vehcon MVerity software, the software that the vendor will use to capture vehicle odometer images, including overview of Service Provider integration with MVerity (Exhibit F)
- ▶ Documentation of Service Provider reports to HiRUC Administration (Exhibit G), an Excel file that includes formatted data for the Service Provider to send each month. Service Providers should expect to send the unformatted raw time-series data as well. Service Provider may propose adjustments to the report format. Precise details of the monthly reports will be finalized at the pre-implementation workshop, described below in section 4.2, subtask 1.1.

Compliance with these documents is highly desired. Proposers should state any instances in which their system may not or will not comply with any aspect of each of these documents, including the specification/requirement/rule that may not be complied with, the way in which the proposed system will not comply with it, and proposed remedies, alternative requirements, or reasons why the requirements may not be needed or should be changed. Potential consequences for the selected vendor of non-compliance with any aspect of these documents that is not explicitly identified in the proposal is discussed in section 7.

Among these documents, please note that:

1. the ConOps is not considered a requirements document—it is a high-level description of the system that is easier to read and understand than the other documents, but nothing in it should be taken to



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make requirements upon the system that are not included in other documents, or to contradict the other documents, and

2. The Business Rules Document (BRD) is evolving, and details of the BRD, such as reporting or reminder frequencies or definitions of noncompliance, are likely to change before the system enters live operations. Proposers should design their systems to accommodate such changes in the Business Rules without requiring additional budget, although small amounts of new coding may be necessary to accommodate such changes. Such changes should be included in the proposal. D'Artagnan will work with the Service Provider to minimize impacts of any changes to the BRD on the Service Provider's system.

3.3 Technologies to report mileage

Part 2 of the HiRUC Demonstration project will feature the following specific mileage reporting technologies. Only one of options 2.a and 2.b. will be selected for inclusion in the Part 2 Automated Demonstration; firms and consortia considering bidding are strongly encouraged to offer both options 2.a. and 2.b. However, proposals that only offer one of the two options will be considered. During live Automated Demonstration operations, Participants will choose from among the three mileage reporting options offered.

1. OBDII Plug-in device with GPS.

- > Device fits into vehicle on-board diagnostic port (OBDII), available on all US cars manufactured since 1996 (except the Tesla 3)
- > Support automated reporting of miles driven by location (GPS)

2.a. OBDII Plug-in device without GPS

- > Device fits into vehicle on-board diagnostic port (OBD-II), available on all cars manufactured since 1996 (except the Tesla 3)
- > Does not contain GPS chipset; calculates distance by integrating the vehicle's speed signal or following actual odometer

2.b. Native Automaker Telematics

- > Native automaker telematics are computer systems embedded in vehicles by the carmaker that can communicate with external carmaker computer systems and use this connection to provide a range of services to drivers
- > Road usage charging would be an application running on a Native Automaker telematics platform

3. Smartphone or camera-phone odometer image capture

- > Also called odometer charge.
- > Use a mobile phone camera to capture and send an image of odometer periodically
- > Will use the patented MVerity software either: as a feature embedded in the vendor's own app to be provided (all apps must support both iOS and Android), or will use the MVerity On Demand system, by which Participants receive a text message with a link to odometer image capture software. Both of these possible interfaces are described in MVerity software



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documentation (Exhibit F). Proposing firms may choose which of the two means of integrating with MVerity software, and describe it in the proposal response. Integrating the MVerity software into the vendor's app is preferred but using the MVerity On Demand system is acceptable.

3.4 Account Management Functions Required to Support the Demonstration Project

The Service Provider will be the interface with Part 2 Demonstration Participants via a web-based account portal (mobile optimized) and phone (customer service representatives). The Service Provider will send Participants any equipment and tools necessary to use mileage reporting technologies by mail. The Service Provider is required to support the following basic functions:

1. Manage Participant accounts: create, modify, and close out accounts for Participants, as described in the SRS.
2. Provide mileage reporting technology (OBDII plug-in device with GPS, and OBDII plug-in device without GPS and/or native automaker telematics interface Smartphone or camera-phone odometer image capture using Vehcon's integrated MVerity or MVerity on Demand), further described in the SRS.
3. Provide ongoing account management and customer services including helpdesk services, web- and phone-based support for technology, mileage reporting, and Road Usage Reports. Customer support includes encouraging compliance among Demonstration Participants (depending on mileage reporting method, by ensuring plug-in devices are plugged in; or encouraging Participants to submit odometer photos; or ensuring native automaker telematics services are connected) by following-up with non-compliant Participants and providing additional support when relevant, described in the business rules.
4. Receive mileage data sent by mileage reporting technologies using the mileage message. Receive odometer message sent by smartphone or camera-phone odometer image capture mileage reporting technology. Update Participant accounts based on the data, as described in the SRS.
5. Transmit account data in near real time (for account updates including newly enrolled vehicles, vehicle de-enrollment, and email/mobile phone number update) and periodically (e.g., RUC data may be transmitted monthly) to HiRUC system and generate monitoring and administration reports (Excel/CSV files) to send to the HiRUC Administration (D'Artagnan staff), as described in the SRS, ICD, and BRD.
6. Distribute periodic Road Usage Reports to Participants. Road Usage Reports will be created by the HiRUC system created for Demonstration Part 1, based on data provided by Service Provider—development and creation of Road Usage Reports is not a function of the Service Provider in this procurement.



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3.5 Participation of Hawaii Counties

The possible participation of Hawaii Counties in the Part 2 Demonstration will impact the way that firms will implement certain aspects of their system.

Each of Hawaii's four main counties (Hawaii, Honolulu, Kauai, and Maui) assesses a gas tax at a distinct rate.¹ These specification documents presume that at least one, if not all, of Hawaii's counties will participate in the demonstration by illustrating a county RUC rate separately from the state RUC rate, for miles driven in that county. In that case, the rate to be charged to Participants using the location-based plug-in device, or other Participants whose vehicles are registered in that county, will be the sum of the state and county rate, and this will be reflected on Road Usage Reports. Otherwise, only the state rate applies.

Hawaii's counties are distinct islands. Movement of vehicles between islands is rare, but plug-in devices with location should note such movements, if they occur, by assessing charges as a sum of the state rate and the rate for the county in which miles are driven. County of travel will be recorded with special codes, known as RuleIDs in the SRS and ICD, for the four major Hawaii counties—Hawaii will have four RuleIDs, while all other states will only have one RuleID per state. Non-location mileage reporting methods shall simply assume that the vehicle remains in the county of its registered address.

Which counties will participate is not known at the time of RFP issuance, and it is not inconceivable that no counties will participate.

¹ Hawaii has five counties, but the fifth, Kalawao, has roads provided by Maui.



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4 Scope of Work for Service Providers

4.1 Introduction

D'Artagnan intends to award a contract for the provision of account management services and mileage reporting technologies to one firm or consortium. The scope of work for the Service Provider is divided into two main sets of tasks:

1. Set-up and testing and
2. Operations.

For consortia (multiple firms) proposing for the Service Provider role: agreements must be in place on or before contract execution among partners participating in the proposal, and must develop interfaces with partners (as specified in the Interface Control Document) in a timely fashion to keep the Demonstration project schedule.

4.2 Service Provider Tasks

Task 1: Setup and testing

For the setup task, the selected Service Provider will ready their system for launch in the live Demonstration by developing any necessary hardware, software, integration with third parties, and adequate support material to assist Demonstration Participants from account set-up to account closure. At the conclusion of the set-up task, Service Provider will undergo end-to-end testing. Upon the successful conclusion of end-to-end testing (all requirements verified—or at D'Artagnan's sole discretion, waived—and D'Artagnan judging the user experience to be acceptable), the Service Provider will be considered certified to provide RUC account management services in the HiRUC Demonstration project using the mileage reporting technologies. Minimum requirements for the set-up tasks are specified in the System Requirement Specification (SRS), Interface Control Document (ICD), Business Requirements (BRD), and MVerity specification documents.

For the set-up and testing tasks, the selected Service Provider will participate in the necessary project management activities leading up to the Automated Demonstration launch. These activities are:

1. Weekly call with D'Artagnan until Automated Demonstration launch (1 hour, focused on verbal update of progress, and the Service Provider raising any issues it has identified); biweekly call thereafter.
2. Resolution of issues and concerns raised by HDOT or D'Artagnan.

Sub-Task 1.1: Set-up

Specific activities for set-up include the following:

1. Attend a two or three day pre-Implementation Workshop, to be held either at the Service Provider's facilities or near HDOT headquarters in Honolulu, two days in week of August 26, 2019, with precise location and date to be determined shortly after NTP. At the pre-Implementation workshop, the Service Provider will demonstrate its account management software, and present its plans for implementation; the HiRUC Administration (D'Artagnan) will present a detailed plan for the testing



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and enrollment phases of the Part 2 demonstration. Both parties will discuss and finalize plans for implementation. At a minimum, the selected Service Provider should expect to send both the vendor's project manager and development lead (2 individuals) to this workshop.

2. Develop or configure account management system, website for customer interactions, and phone-based customer support for the Automated Demonstration.
3. Develop online customer information material to inform Participant choice of mileage reporting technology.
4. Develop account management system for support of data received for the automated distance charge, odometer charge, and (if offered) native automaker telematics – including plans and procedures for each mileage reporting method and website for customer interactions.
5. Develop interfaces to exchange required messages between systems (messages defined in the ICD).
6. Support for plug-in devices:
 - a. Provide off-the-shelf hardware, with possible software changes to adjust to HiRUC Demonstration project requirements.
 - b. Provide up to 2,000 plug-in devices (although it is likely that fewer will be needed, depending on mileage reporting choices of Participants).
 - c. Offer customer support for installing the device in all vehicle makes and models.
 - d. Send devices to Participants between the start of enrollment and go-live date. Devices should arrive at Participants mailboxes no later than one week (7 calendar days) after Participant selects the device. The Service Provider shall be able to provide tracking information on the shipment of each device to the HiRUC Administration, if asked.
 - e. Collect devices via postage-paid envelope/package, to be provided by Service Provider, immediately after the Automated Demonstration ends.
7. Integrate the Vehcon MVerity system and verification for odometer image capture so that the Service Provider's system fully complies with system requirements, business rules, and ICD for reporting of odometer readings captured. Details of Vehcon MVerity Integration are provided in Exhibit F.
8. Develop anything else needed to comply fully with the SRS, BRD, and ICD.
9. The Service Provider may offer value-added services, although they will not be able to charge Participants for the value-added services (or anything else). These value-added services may not supersede or interfere with the delivery or operation of core RUC Demonstration objectives, services, or functions. All value-added services must be opt-in, with a separate opt-in from the Demonstration Participant agreement: value added services cannot use any Participant data unless a Participant has agreed to use them, and all RUC functionality for all mileage reporting methods must work in case that the Participant chooses not to opt in.
 - ▶ The Service Provider may only offer one smartphone app per mileage reporting method. For example, there cannot be one "RUC" app and one value-added services app. In other words, no Participant shall be required to download more than one app to participate fully in the demonstration



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(however, if a Participant switches mileage reporting methods during the demonstration, he/she may be required to download a new app for the new mileage reporting method). If an app is offered, the login information (username/password) required by the app must be the same as the Participant's login information on the Service Provider's web portal. All apps offered must support both iOS and Android.

Sub-task 1.2: Testing

Specific activities for testing include the following:

1. The Service Provider must generate test scenarios and detailed procedures for all specifications in all documents indicated in section 3.2 above, submit them to review by D'Artagnan, and incorporate any feedback provided by D'Artagnan. The Service Provider should submit test scenarios 3 weeks prior to start of testing. D'Artagnan will review for up to 1 week, and the Service Provider will submit an updated version 1 week prior to scheduled testing.
2. The Service Provider must successfully complete three phases of testing (and any necessary re-testing):
 - a. *Unit Testing*—complete test procedures on all mileage reporting methods (including odometer image capture) and account management systems to validate all requirements in the SRS and any associated business rules, transmit results to D'Artagnan, support any follow-up questions. Correct any issues identified. Unit testing is to be completed by proposer at proposer facilities, except that D'Artagnan will provide the Service Provider a few Hawaii residents who can plug in devices to their vehicles to test location accuracy in Hawaii and exclusion of non-chargeable roads. Subject to D'Artagnan's discretion, proposer may offer qualification or certification results from WA RUC, OReGO, or the California Road Charge Pilot Program to satisfy identical requirements during the unit testing phase.
 - b. *Integration Testing*—demonstrate integration via the mileage message with mileage reporting technologies, interfaces to Road Usage Charge Accounting (JSON/REST messages defined in ICD), MS Excel reports to be sent to the HiRUC Administration. Correct any issues identified. Integration testing is to be completed by vendor at vendor facilities. A given Service Provider must demonstrate integration with each mileage reporting technology that it supports.
 - c. *End-to-end system (E2E) Testing*—support a D'Artagnan-led two-week period of testing with at least 12 vehicles in the field: 3 non-EVs using plug-in device with location, 3 EVs using plug-in device with location, 3 vehicles using odometer image capture, and 3 vehicles using the other mileage reporting technology. Correct any issues identified, and re-test, until D'Artagnan determines E2E testing to be complete. E2E testing includes verification of requirements in full system testing and User Acceptance Testing, where the Service Provider must demonstrate a seamless process for Participants from account sign-up to account closure. D'Artagnan will judge whether the user experience is acceptable, and provide feedback in cases in which it is not. Vehicles and drivers will be identified/supplied by D'Artagnan.



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- d. Small-scale Operational Trial (SSOT)—operate a small-scale trial involving up to 30 vehicles identified by HiRUC Administration members in Hawaii for several weeks to 2 months leading up to Participant enrollment, starting after issues identified in all prior phases of testing are rectified. Small-scale operational trial data should be segregated from data collected after the launch of live operations. The small-scale operational trial will include specific testing of the vendor's customer service center (help desk): the HiRUC Administration will call and email the Service Provider's customer service with questions to test the capabilities of the customer service representatives, to ensure that Participants will receive good customer service. The HiRUC Administration will provide feedback to the vendor, and the vendor shall correct any issues identified in the feedback.

Task 2: Operations

Operations includes all account management services conducted during the 9-month duration of the Demonstration, from account set-up to account closure. For the Operations task, the selected firm or consortia will participate in the necessary project management activities during the live Demonstration. These activities include:

- ▶ Weekly call with D'Artagnan during the first two months of launch of the Automated Demonstration (~1 hour, focused on verbal update of progress, and the Service Provider raising any issues it has identified); biweekly call thereafter for the remainder of the Automated Demonstration that will close out with sessions to cover lessons learned during Operations.
- ▶ Resolution of issues and concerns raised by D'Artagnan.

Specific activities for providing account management services (Operations) during the Automated Demonstration include the following:

- ▶ Sign up or create accounts for Participants (starting on the Go-Live date and continuing throughout the first several months of the Automated Demonstration, and
- ▶ For the 9-month duration of the Automated Demonstration:
 1. Distribute and operate all mileage reporting technologies the firm or consortium is proposing to support; including collecting information from any technology or data providers (via the exchange of mileage messages);
 2. Integrate all manual (odometer-based) mileage data the Service Provider has agreed to support;
 3. Manage Participant accounts and follow-up with non-compliant Participants;
 4. Provide customer service, via email, web and phone, to all Participants;
 5. Transmit periodic Road Usage Reports (generated by the HiRUC system) to Participants;
 6. Transmit near-real time and periodic reports to the HiRUC System (as defined in the ICD) and Excel reports to the HiRUC Administration (D'Artagnan), and support the HiRUC Administration in investigations of any data anomalies.
 7. Close out accounts at conclusion of the Automated Demonstration.
 8. Collect plug-in devices at conclusion of the Automated Demonstration.



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4.3 Expected Schedule of Testing, Preparation and Live Demonstration Operations

D'Artagnan intends that setup and live Demonstration operations activities occur and be completed as indicated in the table below.

Table 1: Target Dates for Testing, Preparation and Live Demonstration Operations

Project Activity	Date(s)
Notice to Proceed with Contracted Work	July 29, 2019
Pre-implementation workshop	2 days in week of August 26, 2019
Unit Test Results Due	September 30, 2019
Integration Test Results Due	October 14, 2019
End-to-end System Testing and Small-scale Operational Trial	November 2, 2019 – January 31, 2020
Enrollment of Demonstration Participants Begins	February 1, 2020
Demonstration Participant Onboarding (account set-up)	February 1-29, 2020
Live Demonstration Operations (mileage collection and road usage charge report distribution)	February 1- October 31, 2020
Demonstration Participant Off-boarding (account closeout)	November 1-30, 2020



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5 Procurement Process

5.1 Introduction

This Request for Proposals (RFP) represents a private solicitation for account management services (including collection of mileage data, management of accounts and customer relations) and mileage reporting technologies between D'Artagnan and interested private parties, firms or consortia. As such, this RFP is not a public procurement by or for the Hawaii Department of Transportation or the State of Hawaii, nor subject to public procurement laws of the State of Hawaii or the U.S. Federal Highway Administration. As such, all responses to this RFP will remain confidential and are not subject to federal or state requirements for public disclosure. D'Artagnan is committed to considering and fairly evaluating all responses to this RFP. If D'Artagnan is unsuccessful in attracting responses to this RFP, D'Artagnan reserves the right to enter into one or more direct contracts with private firm(s) to help D'Artagnan carry out its responsibilities for implementing the HiRUC Demonstration Project.

5.2 RFP Notice and Issuance

Notice of this RFP has been provided by D'Artagnan to private firms that have expressed interest in providing account management services and mileage reporting technologies in support of the HiRUC Demonstration project. D'Artagnan has also published this RFP opportunity through industry associations, publications and internet channels. Specifically, notice of the RFP's availability has been sent to:

- (a) Every private firm that has inquired or been referred to D'Artagnan as potentially interested,
- (b) The Hawaii Bid Network: <http://www.hawaiibids.net>, and
- (c) A range of printed and on-line transportation industry periodicals.

5.3 RFP Questions, Clarifications and Addenda

If there are ambiguities in the RFP, proposers may submit written questions to D'Artagnan before the deadline listed in the schedule of procurement activities as shown in Section 9 (Schedule of Procurement Activities and Due Dates). The questions and answers will be electronically distributed for all prospective firms to view. No new questions will be accepted after the deadline. However, on its own accord, D'Artagnan may decide to issue clarifications, amendments or addenda to the RFP after the posted deadline.

To clarify any ambiguities in the RFP or to modify any of its contents to reflect changes, D'Artagnan will issue amendments (or addenda) to the RFP document and notify all parties who have requested such notification.

5.4 Proposal Evaluation Process

5.4.1 Proposal Evaluators

As a business-to-business procurement, only authorized personnel from D'Artagnan will receive, review, and evaluate proposals. All proposals submitted will remain confidential and are not subject to federal or state laws requiring public disclosure.



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5.4.2 Proposal Due Date and Compliance Screening

Proposers should refer to Section 9 (Schedule of Procurement Activities and Due Dates) to meet the deadline for submitting fully-compliant proposals. As a first step, D'Artagnan will conduct a compliance screening of all proposals (Tab C: Minimum Qualifications) to ensure that all mandatory items have been addressed or supplied. Proposers who fail to comply with mandatory terms of the RFP may be disqualified from further consideration. D'Artagnan reserves the right to waive minor defects that are immaterial to the proposal contents so long as such waiver does not provide an unfair competitive advantage to the proposer.

5.5 Proposal Evaluation and Vendor Selection Steps

D'Artagnan will evaluate all proposals that pass compliance screening. The evaluation will follow the three-step process described hereafter. The proposal content presented in Section 6 will be evaluated based on the evaluation criteria indicated in Section 7 (Proposal Evaluation Criteria) of this RFP.

5.5.1 Step 1: Selection of preferred proposer based on proposal scoring

D'Artagnan will select the highest-rated proposal (preferred proposer) for further consideration based on evaluation results of relevant experience and approach to the account management services and mileage reporting technologies.

The remaining steps of the evaluation will be applied to the preferred proposer only. Should the preferred proposer fail to execute a contract with D'Artagnan for any reason (section 5.6.2 below), D'Artagnan reserves the right to begin with the following steps for the next-highest scoring proposer.

5.5.2 Step 2: Financial Due Diligence and Reference Checks

D'Artagnan will conduct reference checks on the firms and/or individuals responsible for delivering required account management services and mileage reporting technologies. In addition, because the potential ramifications of a failed technology or the account management Service Provider would be significant for the Demonstration project, D'Artagnan may require the preferred proposer to demonstrate financial stability. This may include, but not be limited to, bank reference letter, credit inquiry, and/or performance guarantee (such as contract or performance bond).

5.5.3 Step 3: Negotiations

The last step of the proposal evaluation process is to negotiate any remaining outstanding (undecided or unclear) proposal contents with the preferred proposer.

D'Artagnan will reach a final agreement with one firm or consortium during this final step of the proposal evaluation process no later than **July 22, 2019**. The final agreement with the firm or consortium will be subject to agreement on all final terms and conditions of a contract. If a final agreement is not reached with the firm or consortium, D'Artagnan reserves the right to reach down to the second highest-rated firm or consortium to begin negotiations. Steps to reach final agreement are described in the contract finalization process below.



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5.6 Contract Finalization Process

After the proposal evaluation process, the final steps in the procurement process are presented here and described below:

1. Negotiation of Final Terms and Conditions,
2. Execution of Contract, and
3. Provision of materials required by contract.

5.6.1 Step 1: Negotiation of Final Terms and Conditions

Any remaining contractual negotiations and issues should be resolved quickly in order to execute and perfect the contract within the target timeframe. If final negotiations cannot be concluded with the selected firm or consortium, D'Artagnan reserves the right to reach down to the next highest-rated firm or consortium to begin negotiations.

Essential terms of D'Artagnan's contract with the Hawaii Department of Transportation requires that D'Artagnan and any other firms (or lead firms for the consortium) contracted by D'Artagnan observe and adhere to several requirements. These requirements ("flow-through" terms and conditions) are highlighted in Exhibit A (Expected Flow-Through & Essential Contract Terms). Therefore, D'Artagnan intends to incorporate all mandatory flow-through terms and conditions as part of any resulting contract between D'Artagnan and firms (or lead firms for the consortium) selected to provide account management services and technologies.

5.6.2 Step 2: Execution of Contract

D'Artagnan and the firm selected to provide account management services and mileage reporting technologies must execute all contract documents, including those required of D'Artagnan by the State of Hawaii, as a condition of subcontracting with D'Artagnan.

5.6.3 Step 3: Provision of Materials Required by Contract

All contracts must be returned and countersigned by both parties (private firm or lead firm for the consortium and D'Artagnan). In some cases, a vendor consortium may consist of subcontractors to D'Artagnan's subcontractors. In these cases, D'Artagnan will have contractual privity only with the lead firms for the vendor consortium; sub-contracts with other vendors are the responsibility of the lead vendor, although many Terms and Conditions of D'Artagnan's contract with its subcontractors may flow down to the lead vendor's subcontractors. As part of the proposal evaluation and contracting process, D'Artagnan will make every effort to conduct due diligence on vendors' subcontractors as well. Bidders should supply references each subcontractor participating in the RFP.

Proof of required insurance, posting of contract or performance bonds (if required), submittal of tax forms, and submission of other materials must be completed before D'Artagnan can issue a Notice to Proceed (NTP).

5.7 Notice to Proceed

D'Artagnan may issue an NTP to the vendor or vendor consortium as soon as all terms and conditions are met, but NTP for all work is expected on or around July 29, 2019.



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6 Proposal Content

The proposal sections (referred to as “tabs”) should be clearly identified and follow the Tab A-B-C-D format described below. Proposal length limitations are provided for each section.

6.1 TAB A: Proposer Qualifications and Experience (limit: 10 pages)

Proposers must describe their qualifications, successful past experience and certifications in providing the proposed services, including explanations of how this experience is relevant to the objectives of the HiRUC Demonstration Project:

1. Road usage charge account management in the United States, including the mileage reporting methods that the proposer intends to propose for the HiRUC Demonstration and a summary of any certifications previously achieved;
2. Wireless electronic mileage data collection, for purposes of transmitting a Road Usage Report to customers;
3. Provision of customer mileage data in a prescribed format to an external entity that can pass the standards required for certification; and
4. Consumer or taxpayer account and customer relations management.

If a proposing firm uses subcontractors to support the project for any functionality specified in this proposal, the proposer should provide descriptions of qualifications and experience for the subcontractor relating to the functionality that the subcontractor(s) will provide.

6.2 TAB B: Account Management Services Proposal (limit: 20 pages)

Proposers must respond and provide detailed information about how the account management services will be implemented and managed. There are three distinct elements to the evaluation of the firm’s service proposal as described in Tab B: Technical Design, Project Management and Delivery Plans, and Innovation.

Technical Design:

1. Provide a description of mileage reporting technologies that will be provided in the HiRUC Demonstration, as well as account management services that will be provided;
2. Existing certifications for any aspect of road usage charge account management services including mileage reporting technologies supported in the United States;
3. Describe how firm will engage Demonstration Participants by ensuring positive experience from account set-up to account closure. Present any description of interfaces, workflows, and customer support arrangements; and
4. Describe how firm will facilitate and encourage Participant compliance with the Demonstration project.



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Management and Delivery Approach:

5. Present a schedule showing readiness to launch by February 1, 2020.
6. Present risk assessment and mitigation measures, and dependencies on other firms, D'Artagnan or any third party;
7. Present qualifications, experience, and availability of Key Personnel; and
8. Present agreement and distribution of roles within the consortium (if applicable).

Innovation and optional features (optional):

9. Present any viable innovative ideas, such as value-added services, that could potentially prove valuable for the Demonstration project. Services, if provided, should not supersede or interfere with required account management services or supporting mileage reporting technologies.
10. Present any optional features the vendor is offering for an additional price, as indicated in section 7.1 (Price) below

6.3 TAB C: Minimum Qualifications (conditions for acceptance, no page limit)

Proposers must meet the following requirements. Where indicated by a (C) designation, proposers must guarantee that they will provide required evidence of compliance upon the announcement of proposals selected for shortlisting. Failure to provide required proof of compliance no later than announcement of shortlisted proposals may result in proposal disqualification.

Requirements to meet:

- (a) **Acceptance of Flow-through Terms and Conditions.** D'Artagnan's contract with the State of Hawaii requires that the terms and conditions contained in D'Artagnan's contract apply equally to all subcontractors engaged by D'Artagnan ("flow-through" terms and conditions). The flow-through terms and conditions are detailed in Exhibit A (Expected Flow-Through & Essential Contract Terms). Proposers must certify in writing that they knowingly accept and will take all actions necessary to become fully compliant with all mandatory flow-through terms and conditions if the proposer is awarded a contract pursuant to this RFP.
- (b) **Proof of Insurance (C).** Proposers must supply proof of current and adequate insurance coverage as required in Exhibit A (Expected Flow-Through & Essential Contract Terms). If proposers currently lack adequate insurance, proposers may certify that they will acquire all required insurance coverage within 5 business days of announcement of shortlisted as the Service Provider as described in Section 3.



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If the proposer cannot or will not accept or be in full compliance with the requirements of the RFP or any of the Exhibits, the proposer must explain and note these instances as Exceptions in Tab D. Firms may propose alternative provisions, language or standards in place of the Exceptions. D'Artagnan maintains sole discretion on whether to make allowance for any Exceptions.

If a proposal is submitted conditioned upon D'Artagnan's acceptance of one or more Exceptions, this must be clearly stated in Tab D. D'Artagnan will judge whether each Exception is allowable (though possibly subject to loss of points and/or negotiations), or unallowable. If D'Artagnan deems a given Exception to be unallowable, the proposal will be immediately removed from further consideration. If D'Artagnan grants an Exception for any proposer, that Exception will be granted to all proposers requesting it.



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7 Price and Proposal Evaluation Criteria

7.1 Price

The budget for the delivery of the services described in this RFP is **\$750,000**.

Proposer who cannot offer the complete suite of services included in this RFP for **\$750,000** are encouraged to bid anyway, clearly indicating which requirements/features they are unable to support, and how their system will perform differently from the system described here. Deductions in points will be made based on the overall impact of the items that are not supported. *Note that the number of Participant vehicles (2,000), the number of mileage reporting methods to support (3), and the length of the Automated Demonstration (9 months) are non-negotiable.*

In addition to the budget, D'Artagnan has reserved a contingency budget for optional features of **up to \$50,000**. Optional features may be innovations beyond the scope of this proposal that the proposer believes would improve the Participant experience in this project, or in the case that the proposer is unable to deliver the described project within the available budget, there may be aspects of the Automated Demonstration that the proposer was unable to deliver for \$750,000. For each distinct optional feature offered, please specify a price. The total value of all optional services offered may exceed \$50,000, however, the score will be assigned based on the optional services that D'Artagnan would intend to use, and the total value of such services will not exceed \$50,000.

Note that the intended payment schedule will be based on the following milestones:

- ▶ Fixed fee for successful completion of Unit and Integration Testing (all requirements and interfaces verified—or at D'Artagnan's sole discretion, waived)
- ▶ Fixed fee for successful completion of End-to-end testing and the Small-scale Operational Trial (all requirements verified—or at D'Artagnan's sole discretion, waived—and D'Artagnan judging the user experience to be acceptable)
- ▶ Monthly fee per month for 9 months of operations
- ▶ Monthly fee per month for 9 months of customer service
- ▶ Fixed fee for closeout.

Precise payment schedule is subject to negotiations.

Proposers shall indicate the amount for each milestone. The available budget is inclusive of the Hawaii 0.5% wholesale GET or use tax.

For any of the above milestones, D'Artagnan reserves the right to withhold payment from the vendor for nonperformance. Nonperformance includes: noncompliance with any aspect of the RFP or exhibit documents that is not explicitly mentioned in proposal exceptions (Tab D).



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7.2 Evaluation of Experience

Proposals will be evaluated on Qualifications, Experience, and Account Management Services Proposal, which contained in Tabs A and B (Section 6).

7.2.1 Successful Relevant Experience (200 points)

Up to 200 points will be awarded based on how well each proposer presents its motivations, qualifications and relevant experience in Tab A. Scoring criteria are as follows:

1. Does the proposer have and explain experience in providing account management services and mileage reporting technologies in the United States?
2. Does the proposer have and explain existing certifications for providing account management services and mileage reporting technologies in the United States?
3. Does the proposer have and explain experience in collecting wireless electronic data, for purposes of reporting road usage charging to Demonstration Participants?
4. Does the proposer have and explain experience in handling consumer or taxpayer accounts?
5. Does the proposer have and explain experience in providing customer relations management?

7.2.2 Approach to End-to-End Service (150 points + 50 bonus points)

Up to 150 points will be awarded based on how the services will be implemented and managed as described in proposal Tab B. A bonus of 50 points will be awarded for innovation and optional features. Scoring criteria are as follows:

Technical Design (50 points):

1. Does the proposer clearly demonstrate their ability to provide account management services and mileage reporting technologies for the Demonstration that can pass the standards required for certification?
2. Does the proposer have the ability to report mileage data to the HiRUC system (system being developed for Part 1 of the Demonstration)?
3. Does the proposer provide and explain the required mileage reporting methods?
4. Does the proposer have a clearly articulated plan to encourage Demonstration Participant compliance and contribute to a positive Participant journey throughout the Demonstration?

Management and Delivery Approach (100 points):

5. Does the proposer present a schedule showing readiness to launch by February 1, 2020?
6. Does the proposer adequately assess project delivery risks and suggest appropriate risk mitigation measures?
7. Does the proposer have a qualified and available team to perform design and delivery of account management services?



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8. If the proposer is a consortium of firms, does the lead firm have agreements in place with all participating firms to provide end-to-end account management services and supporting mileage reporting technologies?

Innovation and Optional Features (50 bonus points):

9. Does the proposer present innovative ideas (such as value-added services) that would potentially prove valuable for the Demonstration?
10. Does the proposer offer any optional features within the available budget that would enhance the experience of the Automated Demonstration and can be accommodated in the budget for optional features?

Compliance with technical documents is highly desired. Proposers that are aware that their products or services may not comply with certain requirements should state so in their proposals, along with proposed remedies, alternative requirements or reasons why the requirements may not be needed or should be changed. Non-compliance with requirements may result in lower scores.



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8 Instructions for Submitting Proposals

Parties interested in submitting a proposal to must comply with the following terms and conditions of this Request for Proposals.

8.1 Submission of Questions Regarding this RFP

To facilitate timely response, D'Artagnan will accept questions during the RFP process only from prospective proposers. D'Artagnan will not accept, and has no obligation to respond to, inquiries from other individuals or firms, including but not limited to consulting firms, associations, organizations, governmental units, media, general public, etc.

If a proposer requires an explanation, clarification or interpretation of any of the RFP or Exhibits, it may submit each question by email only, to steve.morello@dartagnanconsulting.com no later than June 14, 2019 at 5:00 PM Hawaii Standard Time.

8.2 Submittal Format

Proposals must be submitted in electronic format, capable of being printed on standard US letter size (8.5 x 11 inch) paper. Proposals must adhere to any page limits specified in Section 6 (Proposal Content). Proposals must use a 12-point font for all main text. Proposals must use a minimum of 0.5-inch margins on all sides.

8.3 Proposal Due Date

All proposals must be delivered by email no later than the due date for proposal submission as shown in Section 9 (Schedule of Procurement Activities and Due Dates).

8.4 Delivery of Proposals

Proposals must be addressed to D'Artagnan Consulting and submitted via email to:

Steve Morello — steve.morello@dartagnanconsulting.com

All proposals received will be acknowledged as “received” by D'Artagnan. If you have submitted a proposal but did not receive any acknowledgement by 5 pm HST on the Proposal Due Date, immediately contact:

Steve Morello, D'Artagnan Consulting, at (571) 535-0600

8.5 Alterations or Misrepresentations

Submittal of a proposal by a firm or consortium constitutes a material assertion that the firm or consortium is qualified to fully perform all work and delivery all materials at the prices specified in the proposal. Misrepresentation may be cause for (a) rejection of the proposal; (b) cancellation of the contract award; or (c) termination of any resulting contract.

8.6 Withdrawal or Revisions of Proposals

After submitting a proposal to D'Artagnan, the firm or consortium may withdraw or revise it if (a) the firm or consortium submits a written request signed by the party authorized to bind the proposing firm or consortium; and (b) D'Artagnan receives the request by the proposal due date. The original proposal may be revised and resubmitted as the official proposal if D'Artagnan receives it by the proposal due date.



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9 Schedule of Procurement Activities and Due Dates

The following schedule and due dates are controlling for this RFP. If any references to due dates, number of days or time periods are made in this RFP or in any other document or materials, in the event of conflicting dates or times, this Schedule of Procurement Activities and Due Dates shall prevail.

Table 2: Schedule of Procurement Activities and Due Dates

Procurement Activity	Due Date
RFP Issuance	June 5, 2019
Deadline to Submit Questions	June 14, 2019 5 PM Hawaii Time
Last Issuance of RFP Addenda	June 17, 2019
Deadline for submission of RFP Response	July 1, 2019 8 AM Hawaii Time
Due Diligence Checks	July 1-8, 2019
Announce Preferred Vendor	July 8, 2019
Contract Negotiations	July 8-22, 2019
Announce Selected Vendor	July 22, 2019
Contract Executed	July 22, 2019
Deadline for Certifications and Documents to be Filed	July 29, 2019
Expected Notice to Proceed with Contracted Work	July 29, 2019



Exhibit A: Relevant Terms and Conditions of D'Artagnan's contract with HDOT that apply to all D'Artagnan vendors



Exhibit B: Final Demonstration Project Part 2 Concept of Operations



Exhibit C: Final Part 2 System Requirements Specification



Exhibit E: Final Part 2 Business Rules Document



Exhibit F: Documentation of Vehcon MVerity software



Exhibit G: Documentation of Service Provider Reports to HiRUC Administration