

UNIVERSITY OF HAWAII NOTICE OF EXEMPTION CHAPTER 103D, HRS

The President, University of Hawaii, is in the process of reviewing the request from
Division of Student Affairs, University of Hawaii at Hilo (Department/Campus)
for exemption from Chapter 103D, HRS, for the following goods and services:
Consulting services to provide a written Strategic Enrollment Management (SEM) plan that includes data
assessment, strategies, goals, conclusions, and recommendations.

Vendor: To be determined
(If known)
Address:

Term of Contract: (If known)	From:	To:	Cost: \$250,000.00
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Direct any inquiries to: Department: Division of Student Affairs Contact Name/Title: Christopher Holland, Interim Vice Chancellor Address: 200 W. Kawili Street, SSCW-304 Hilo, Hawaii 96720	Phone Number: 808-932-7445 Fax Number: 808-932-7471
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Date Posted: October 25, 2023

Submit written objections to this notice to issue an exemption from Chapter 103D, HRS, within seven (7) calendar days from the date posted to:

Office of Procurement Management
1400 Lower Campus Road, Room 15
Honolulu, Hawai'i 96822
email: OPM@hawaii.edu

REQUEST FOR EXEMPTION FROM CHAPTER 103D, HRS

TO: OFFICE OF PROCUREMENT MANAGEMENT

FROM: University of Hawaii at Hilo, Division of Student Affairs

(Department/Program)

Pursuant to APM Section A8.220, the Department requests a procurement exemption to purchase the following:

Description of goods, services, or construction:

Consulting services are being sought to provide a written Strategic Enrollment Management (SEM) plan that includes data assessment, strategies, goals, conclusions, and recommendations. The consultant's role includes facilitating a phased implementation of the plan, examining the academic portfolio, diagnosing enrollment challenges and opportunities, setting goals and priorities, and establishing an implementation structure. The plan will focus primarily on undergraduates, encompassing first-year students, domestic and international students, transfers, and will consider Continuing Education, online, and graduate school representation.

Estimated Cost: \$ 250,000

(1) Explanation describing how procurement by standard competitive means is either not practicable or not advantageous to the University;

Procurement by standard competitive means, involving the preparation and advertising of a formal request for proposals, will not permit the campuses to enter into a contract in time to impact Fall 2024 enrollment figures. Enrollment at UHH has declined in recent years. UHH Fall 2023 enrollment fell by 2.5% as compared to Fall 2022 enrollment; UHH Fall 2022 enrollment fell by 3.5% as compared to Fall 2021 enrollment. Potential students are currently deciding where to apply for Fall 2024 admission. Entering into contracts for UHH, respectively, with services to begin in January 2024 is necessary to begin positively impacting recruitment and retention rates for Fall 2024.

(2) Details of the process or procedures to be followed in selecting the vendor to ensure as fair and open competition as practicable;

In anticipation of the time constraints applicable to this procurement, an initial list of 10 consulting firms that provide enrollment management services will receive Invitations to Submit Proposals. Proposals from responding firms will be reviewed by a group already designated by the Chancellor. The group will identify 3 vendors based on 1) Cost and the ability to deliver the best value based on the firm's quality of approach, experience, and personnel to address the scope of work, as demonstrated by past performance references and cases. 2) Technical capability and approach for meeting statement of work. 3) Qualifications 4) Methodology and timeline for project completion 5) Adequacy, understanding, and completeness 6) Ability to comply with the terms and conditions. The top 3 firms will be forwarded in unranked order to the Chancellor for final selection.

(3) A description of the Department's internal controls and approval requirements for the exempted procurement; and

The Office of Procurement and Real Property Management will assist in reviewing the contracts for services required. Key personnel from UHH Division of Student Services will be responsible for managing and overseeing the work of the firm as well as ensuring that the firm adheres to the time schedule set forth in the agreement. Finally, all expenditures made under the agreement will be subject to review and approval, and will be processed in conformity with the University's policies and procedures.

(4) A list of Department personnel, by position title, who will be involved in the approval process and administration of the contract:

Christopher "Chris" Holland, Interim Vice Chancellor for Student Affairs, UHH
Kaleihiiikapoli "Kalei" P. Rapoza, Vice Chancellor for Administrative Affairs, UHH
Keiki Kawai'ae'a, Interim Vice Chancellor for Academic Affairs, UHH
Carrie Masanda, Director of Contracts and Procurement, UHH
Chelsea Grant, Fiscal Specialist, Division of Student Affairs, UHH

Direct questions to: Chris Holland Phone: 808-932-7445

I CERTIFY THAT THE INFORMATION PROVIDED ABOVE IS TO THE BEST OF MY KNOWLEDGE, TRUE AND CORRECT.

Christopher Holland Chris Holland Digitally signed by Chris Holland
Date: 2023.10.23 07:59:16 -10'00' 10/23/23
Full Name of Principal Investigator, Department Signature Date
Head, or Administrator

Carrie Masanda Carrie P Masanda Digitally signed by Carrie P Masanda
Date: 2023.10.24 13:57:05 -10'00' 10/24/2023
Full Name of Fiscal Administrator Signature Date

APPROVED:

Bonnie Irwin, Chancellor UHH Bonnie D Irwin Digitally signed by Bonnie D Irwin
Date: 2023.10.23 11:41:09 -10'00' 10/23/23
Full Name of Vice President or Chancellor Signature Date

FOR OPM USE ONLY

OPM COMMENTS:

APPROVED DENIED

David Lassner Digitally signed by David Lassner
Date: 2023.11.17 21:55:36 -10'00' 11/17/23
PRESIDENT, UNIVERSITY OF HAWAII DATE

**UNIVERSITY OF HAWAI'I AT HILO
INVITATION TO SUBMIT PROPOSALS TO
DEVELOP STRATEGIC ENROLLMENT MANAGEMENT PLAN**

I. Background Information:

The University of Hawaii at Hilo (UH Hilo) invites qualified and experienced professional consultants to submit proposals for the development of a comprehensive Strategic Enrollment Management (SEM) plan. UH Hilo is a public university located in Hilo, Hawaii, and is part of the University of Hawai'i System. With a diverse range of undergraduate and graduate programs, UH Hilo seeks to align its enrollment strategies with its vision of preparing students to thrive, compete, innovate, and lead in their professional lives. The SEM plan will cover both undergraduate and graduate enrollment (classified, unclassified, online, and campus immersion) for the next three to five years. Our aim is to engage every student in applied learning that links theory to practice in ways that are collaborative with the distinctive natural and cultural environments of Hawaii and promote responsible participation in a global society.

Information on UH Hilo may be found at hilo.hawaii.edu.

II. Statement of Work

UH Hilo is seeking a consultant with expertise in strategic enrollment management to provide analysis and recommendations. The consultant's role includes facilitating a phased implementation, examining the academic portfolio, diagnosing enrollment challenges and opportunities, setting goals and priorities, and establishing an implementation structure. The plan will focus primarily on undergraduates, encompassing first-year students (Fall 2025), domestic and international students, transfers, and will consider Continuing Education, online, and graduate school representation. The plan will include retention effort implementation for the class beginning in Fall 2024.

The selected consultant will work in collaboration with UH Hilo to develop a flexible written SEM plan that adapts to market, demographic, and fiscal changes. The plan will be informed by extensive internal and external data analysis, including market trends and consultations with various campus and community stakeholders. The plan will encompass goals, strategies, and tactics to achieve optimal enrollment. The consultant shall provide a written Strategic Enrollment Management Plan to the university. The plan must include sections that summarize the information collection process, data assessment, results/findings, strategies, goals, conclusions, recommendations, and performance metrics.

The project will be divided into three phases:

A. Phase I: Diagnostic and Benchmarking

1. Evaluate current processes, organizational structure, data, and technology supporting enrollment and retention.
2. Conduct internal stakeholder interviews and listening sessions.
3. Identify areas for analysis and assessment, such as equity, diversity, recruitment, marketing, financial aid, and more.
4. Benchmark against comparable institutions, aspirant peers and competitors.
5. Examine academic and support service alignment.

B. Phase II: Solution Design

1. Engage stakeholders to design strategies and tactics spanning the student lifecycle.
2. Identify specific enrollment goals and align them with broader university strategic and financial management priorities.
3. Address misalignments in school/college goals and institutional strategy.
4. Identify college and campus marketing strategies to support improvements in awareness, engagement and enrollment.
5. Propose strategies to eliminate barriers to enrollment and retention processes to ensure student systems (i.e. recruiting, admissions, financial aid, advising, registration, billing and payments, scheduling and student support operations) are efficient and student-centered. This should include ease of implementation and provide some criteria around prioritization for achieving objectives (right away versus more complex coordination).
6. Identify best practices for institutional buy-in and change management.

C. Phase III: Implementation Phase

1. Develop an action plan with performance metrics for key areas.
2. Develop a map of the assessment cycle that assists with monitoring implementation of tasks, reviews the assessment of activities for continuous improvement and utilizes analyses for planning future enrollment cycles.
3. Support the transition from SEM plan development to successful implementation.
4. Establish a plan for regular reassessment and recalibration.

III. Selection Criteria

Interested search firms should submit a comprehensive proposal that provides, at a minimum, the following information.

A. Cost or financial proposal (15 points)

Provide pricing information in a clear and itemized format. The pricing should be presented in a separate section, and must include all applicable costs, such as service fees, taxes, travel, and any additional charges related to the proposed solution.

Please ensure that pricing is detailed, transparent, and inclusive of all relevant expenses to facilitate an accurate evaluation of proposals.

Scoring in this section is based on the ability to deliver the best value based on the firm's quality of approach, experience, and personnel to address this scope of work, as demonstrated by past performance references and cases.

B. Demonstrated experience (15 points)

To assess the suitability of your proposal, we require comprehensive information regarding your background, areas of specialization, and your track record of experience. Present detailed background information regarding your organization, including areas of specialization, expertise, and a brief overview of your team's qualifications. Provide a list of institutions or organizations that you are currently engaged with or have successfully assisted in the past three years. Please include the name of the institution and a brief description of the services provided. Submit three references with the names of the institutions, the corresponding administrators, and their contact information. These references should be from organizations you have previously served, allowing us to verify your experience and track record in a more in-depth manner.

Scoring in this section is based on the comprehensiveness of the information provided, the relevance of your experience to the current project, and the quality of the references supplied.

C. Technical capability and approach for meeting the statement of work. (15 points)

Explain how the objectives outlined in the Statement of Work (SOW) will be achieved. Elaborate on your technical capabilities, including the qualifications and expertise of your team members that make you well-suited for this project. Present a detailed and comprehensive approach for executing the tasks and fulfilling the objectives defined in the SOW and include methodologies, tools, and technologies that will be utilized. Highlight any innovations or technological advancements that you plan to leverage to optimize project efficiency and achieve the desired outcomes.

Scoring for this section will be based on the technical depth and relevance of your proposed approach, the alignment with the SOW requirements, and the innovative solutions presented.

D. Qualifications to meet expectations (15 points)

Please describe how the qualifications of your firm, management and support staff will enable you to meet the expectations.

E. Methodology and timeline for project completion (10 Points)

Provide detailed methodology with a realistic and well-structured project timeline.

- F. Adequacy and completeness of the proposal (10 points)
- G. Understanding of the project (10 points)
- H. Compliance with the RFP's terms and conditions (5 points)
- I. Format (5 points)

Page Limit: The proposal should not exceed 15 pages, excluding appendices.

Font and Margins: Preferred font size, 12-point and margin size, 1-inch margins on all sides.

Line Spacing: Double-spaced.

Page Numbering: Number each page of the proposal, including cover pages and appendices.

IV. Submission of Proposals

Interested firms should submit Six (6) hardcopies of their proposal including the requested fee schedule to the Vice Chancellor of Student Affairs, University of Hawaii at Hilo, ATTN: Christopher Holland, 200 W. Kawili Street, Hilo HI 96720 no later than 4:00pm (Hawaii Standard Time), December 15, 2023. For additional information, please contact Chris Holland by phone at (808) 932-7445 or by email at cjh2020@hawaii.edu.

V. Certification Requirements for Contract Award and Final Payment

Please note that State law requires certification of compliance through the Hawaii Compliance Express (vendors.ehawaii.gov) prior to formal award of any contract and prior to any payments for services. Further, a second, final tax clearance will be required prior to final payment.

The above certification should be applied for by Offerors in a timely manner. The University will inform the successful Offeror in writing as to the exact date and time that the above certifications are due to the University. If the successful Offeror does not submit the certifications by the date and time specified in the University's written notification, the successful Offeror's quotation shall be rejected. Thereafter, the University reserves the right to consider other quotations received for award.

VI. Other

The University reserves the right to negotiate a final contract with the selected offeror including but not be limited to: a detailed scope of work, final timeline for completion of services, final compensation and payment schedule, and terms and conditions.