

## UNIVERSITY OF HAWAII NOTICE OF EXEMPTION CHAPTER 103D, HRS

The President, University of Hawaii, is in the process of reviewing the request from  
Shidler College of Business, University of Hawaii at Manoa (Department/Campus)

for exemption from Chapter 103D, HRS, for the following goods and services:

Shidler College of Business is seeking to procure an all-inclusive package including the meeting venue, banquet rooms, lodging, food and beverage, audio visual services, network connectivity and parking for an Executive Education Program Residence Weekend to be held from August 22 - 26, 2024 . It is estimated the 55 students and 12 faculty/staff will be attending the event.

The Executive Education Program Residence Weekend is an intensive 5 day/4 night event and serves as the foundational experience for the Executive students by laying the groundwork to ensure adequate content delivery from the start of Residence Weekend through Commencement.

**Vendor:** To be determined  
(If known)

**Address:**

<b>Term of Contract:</b> (If known)	From:	To:	<b>Cost:</b> \$170,000 - \$190,000
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**Direct any inquiries to:**  
Department: Shidler College of Business, Executive Education Center

Contact Name/Title: Irene Johnson, Admin & Fiscal Support Specialist

Address: 2404 Maile Way  
Honolulu, Hawaii 96822

Phone Number:  
808-956-8870

Fax Number:  
808-956-3766

Date Posted: February 9, 2024

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:** Shidler College of Business, Executive Education Center  
(Department/Program)

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

Description of goods, services, or construction:  
See attached

Estimated Cost: \$ 170,000 - 190,000

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

(2) Details of the process or procedures to be followed in selecting the vendor to ensure as fair and open competition as practicable;  
The Shidler College of Business will request the same required meeting venue, banquet rooms, lodging, food and beverage, audio visual services, network connectivity and parking from three (3) vendors on Oahu with sufficient capacity for the event. We will ensure that the vendor selected is HCE compliant.  
Vendor selection will be based on the lowest responsive and responsible bidder.

(3) A description of the Department's internal controls and approval requirements for the exempted procurement; and  
 EEC Executive Director, Program Coordinator and Admin & Fiscal Support Sp will review all quotes submitted and complete OPRPM Form 95. V. Vance Roley, Dean and the Shidler COB Fiscal office will review and approve the applicable forms.

(4) A list of Department personnel, by position title, who will be involved in the approval process and administration of the contract:  
 Olulani Garcia, Exec Ed. Executive Director  
 Jan Mulvey, Administrative Services Manager  
 V. Vance Roley, Dean

Direct questions to: Irene Johnson Phone: 808-956-8870

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

V. Vance Roley, Dean  
 Full Name of Principal Investigator, Department Head, or Administrator

V. Vance Roley  
 Signature Dec 6, 2023  
 Date

Jan Mulvey, Administrative Services Mgr  
 Full Name of Fiscal Administrator

Jan Mulvey  
 Signature Dec 7, 2023  
 Date

APPROVED:  
Alexandra French, Chief Business Officer  
 Full Name of Vice President or Chancellor

Alexandra French  
 Signature Dec 6, 2023  
 Date  
Digitally signed by Alexandra French  
 Date: 2023.12.15 13:09:12 -10'00'

FOR OPM USE ONLY

OPM COMMENTS:  
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APPROVED  DENIED

David Lassner Digitally signed by David Lassner Date: 2024.02.27 16:03:17 -10'00' 2/27/24  
 PRESIDENT, UNIVERSITY OF HAWAII DATE

**OPM Form 138, Request for Exemption from Chapter 103D, HRS  
Shidler College of Business, Executive Education Center**

**Background**

The Executive Education Program (EEC) is designed for experienced professionals who are already working in leadership positions. The accelerated academic curriculum allows students to enhance their knowledge and skills for professional growth and career advancement, while maintaining employment in their respective fields.

The Executive Education Program Residence Weekend is an intensive 5 day/4 night event and serves as the foundational experience for the Executive students by laying the groundwork to ensure adequate content delivery from the start of Residence Weekend through Commencement. Participation is mandatory and offered to executive participants in an all-inclusive manner including the meeting venue, banquet rooms, lodging, meals, audio visual services, network connectivity and parking.

A few key aspects, benefits and goals attributable to Residence Weekend are:

- The orientation weekend helps students prepare for the challenges and opportunities that lie ahead. Setting expectations for the rigor of the program.
- Team building with cohort participants with required interactive and focused group projects.
- Reviewing key concepts, brushing up on math and statistics and practicing time management strategies.
- Invaluable in-person networking with fellow classmates, professors, alumni and other professionals.
- Hotel setting with 24/7 access to meeting rooms and lodging to minimize distractions and enhance the cohort's interactions.

Residence Weekend is an industry standard across Executive Education programs. The following colleges and universities have a Residence Weekend or similar that is included in the tuition.

Purdue University's Mitchell E. Daniels, Jr., School of Business encompasses a quarterly residence weekend into their two-year program at a hotel setting with 24/7 access to meeting rooms and lodging.

The University of Washington Foster School of Business begins each Executive program's student experience with an intensive 5-day off-site retreat, it is referred to as their academic "boot camp".

The University of Pennsylvania Wharton Aresty Institute of Executive Education includes a 5-day off-site residence annually at the start of each year within their two-year degree plan.

**Description of goods, services, or construction:**

Shidler College of Business is procuring for the Executive Education Program Residence Weekend for the following, as an all-inclusive package: meeting venue, banquet rooms, lodging, food and beverage, audio visual services, network connectivity and parking.

Residence weekend is scheduled from August 22-26, 2024, from 8am – 9:30pm. The estimated number of participants is 67 that includes 55 students and 12 faculty/staff.

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

Procurement by standard competitive means is not practicable and not advantageous to the University for many reasons, as outlined below:

- AP A8.220 Procurement allows for the exemption of facility costs for conferences, meetings, and training sessions. Separating the Residence Weekend location and separately procuring for the other components, i.e lodging, meals, A/V, parking, etc. would be cumbersome and not necessarily yield the results and/or meet the objectives of the EEC Program or the Residence Weekend experience for participants.
- The Formal Invitation for Bid (IFB) was considered but determined that it would not be feasible as hotel sales/catering agreements include terms that is precluded by the IFB process.
- Running separate procurements would increase the administrative workload on all levels of UH staff from the program level through to System. Burdening an already overloaded and short-staffed environment. Not to mention the increase in workload to manage separate contracts, awards and payments.
- Having an all-inclusive procurement package streamlines the event coordination and oversight and allows for one venue to be responsible and provide for the entire package which helps to ensure a successful event at a single location working through a single point of contact for any requests or issues as may arise. EEC would not be left facilitating any issues or gaps between multiple locations and/or vendors.
- Tuition covers the cost of the Residence Weekend so having individual participants pay and/or reimburse later for their portions of lodging, meals, parking, etc. would be double charging. In addition, one of Executive Education Program’s mission promotes “minimal interruption to their demanding career obligations”. Having students make their own arrangements would be an unnecessary burden and would be counterproductive on the student’s part.

- As the only EEC program in the State of Hawaii, we aim to be competitive in providing an experience at a similar standard as our competitors. Both venue and lodging are key components in providing a distraction-free setting for the participants. Not able to procure venue and lodging as a whole would negatively impact Shidler College of Business' ability to recruit and retain top candidates to our Executive Education programs, supply talents lacking to Hawaii market, and persist the quality of the EEC program.

For the reasons stated above, Shidler College of Business is requesting an exemption for the Executive Education Program Residence Weekend to procure for the entire function as an all-inclusive package to include:

- meeting venue
- banquet rooms
- lodging
- food and beverage
- audio visual services
- network connectivity
- parking