

**UNIVERSITY OF HAWAII
NOTICE OF AMENDMENT TO EXEMPTION FROM CHAPTER 103D, HRS**

Purchase Order No. / Contract No. C240060

Name of Contractor: Kuali, Inc.

Description of goods or services:

The contract is currently for assessment of the migration of the current, legacy, on-premise KFS option to the Kuali hosted SaaS version of KFS and will expire on January 31, 2025.

The scope of work for the purchase is revised as follows:

The scope will be amended to extend the term of the contract until January 31, 2029 to include all conversion, migration and customization efforts as well as include full SaaS operational costs

Original Purchase Price:
\$ 2,600,000.00

Amended Purchase Price:
\$ 8,900,000.00 (est.)

Direct any inquiries to:

Department: Information Technology Services

Contact Name/Title: Garret T. Yoshimi, VP for Information Technology & CIO

Phone Number:

(808) 956-3501

Address: 2520 Correa Road
ITC, 6th Floor
Honolulu, Hawaii 96822

Fax Number:

(808) 956-78322

Date Posted: August 12, 2024

Submit written objections to this notice of intent to amend a procurement exemption purchase within seven (7) calendar days from the date posted to:

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

UNIVERSITY OF HAWAII
REQUEST FOR AMENDMENT TO EXEMPTION FROM CHAPTER 103D, HRS

To: Kalbert K. Young **Date:** 08/06/2024
Chief Procurement Officer, University of Hawaii

Via: Office of Procurement Management

From: UH System, Office of the Vice President for Information Technology & Chief Information Officer
(Campus & Department/Program)

Vendor/Contractor: Kuali, Inc

Contract No./Purchase Order No.: C240060 / PO 284460

Original Purchase Price: \$ 2,600,000 (est) **Amended Purchase Price:** \$ 8,900,000 (est. w/tax)

Pursuant to University Administrative Procedure AP 8.220, and consistent with HRS §103D-102(b)(4) and HAR Chapter 3-120, the department requests an amendment to a contract or purchase order issued under a previously approved procurement exemption as follows (attach additional sheets if necessary):

1. Description of the goods or services:

UH Financial and IT organizations are working on migrating the current, legacy, on-premise KFS operation to the Kuali hosted SaaS version of KFS. The scope of work for this agreement supports the full onboarding and ramp up of the Kuali conversion and migration team to support UH and resolve all open existing customizations to KFS at UH, and operational costs through the start of calendar 2029. The resulting effort will relieve UH from the ongoing maintenance, patching and upgrade tasks that have prevented the UH KFS implementation from taking full advantage of continuous, ongoing improvements to KFS by Kuali (only available under the SaaS version of KFS).

2. Explain in detail what is being amended:

The term of the agreement will be extended through January 31, 2029, and includes all conversion, migration and customization efforts, as well as full SaaS operational costs through the period of the agreement.

Exhibit A1: The Estimated Effort Hours for Product Customization - Base Product, Overlay/Custom Functionality, and Product Manager, BA, Testing have increased.

Exhibit A3: All 296 current customizations will not be the project's end result. The joint scope analysis shows that 176 customizations (or 59% of current customizations) must be reimplemented in base code during both project phases.

Exhibit A4: Kuali commits to Phase 1 go-live no later than September 2026. Additional scope reductions and/or changing preferred delivery of Customizations from Phase 1 to Phase 2 may make a Spring 2026 go-live possible. Please see "Exhibit 4A - Estimated Timeline" for updated project timeline.

Exhibit B: Added to elaborate on the work to be performed under this agreement, and the value to the University.


3. Explanation in detail the reasons that the amendment is necessary:

It was anticipated that an amendment would be necessary since the initial agreement was made prior to the Kualii and UH team resolving the full scope and extent of the University's needs in order to successfully migrate to Kualii KFS SaaS operations. The rough estimates provided in the initial agreement were prior to Kualii's full understanding of the scope of work, and the collaboration necessary between Kualii, UH-ITS and UH-FMO in order to lock in the agreed scope of work. The final agreed upon work plan is provided in Kualii's contract amendment.

4. Direct questions to: Garret T. Yoshimi Email Address: gyoshimi@hawaii.edu

Certification: I certify that the information provided herein is true and correct to the best of my knowledge.

Garret T. Yoshimi
Full Name of Principal Investigator, Department Head, or Administrator



Signature Garret Yoshimi
2024.08.06 14:50:16 -10'00'
Date

Blanche Fountain
Full Name of Fiscal Administrator

Blanche Fountain Digitally signed by Blanche Fountain
Date: 2024.08.06 16:42:37 -10'00'
Signature Date

APPROVED:

Garret T. Yoshimi
Full Name of Vice President or Chancellor


Signature Garret Yoshimi
2024.08.06 14:50:33 -10'00'
Date

FOR OPM USE ONLY

OPM COMMENTS:

APPROVED DENIED

CHIEF PROCUREMENT OFFICER, UNIVERSITY OF HAWAII

August 26, 2024
DATE