

UNIVERSITY OF HAWAI'I NOTICE OF EXEMPTION CHAPTER 103D, HRS

The Chief Procurement Officer, University of Hawai'i, is in the process of reviewing the request from
Office of the President (Department/Campus)

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

Licenses for a system-wide instance of the EAB Data Management Platform, Edify, and 10 university-specific instances of the EAB Student Success CRM, Navigate360.

Vendor/Contractor: EAB Global, Inc.
(If known)

Address:
2445 M Street, NW
Washington, DC 20037

Term of Contract: (If known)	From: To be determined	To: To be determined	Cost: \$8,000,000.00 over five years (est.)
--	------------------------	----------------------	--

Direct any inquiries to:

Department: Office of the President

Contact Name/Title: Kim Siegenthaler, Senior Advisor

Address: 2444 Dole Street, Bachman 201
Honolulu, Hawaii 96822

Phone Number:
(808) 956-8207

Fax Number:
(808) 956-5286

Date Posted: April 28, 2025

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

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

To: Kalbert Young **Date:** _____
Chief Procurement Officer, University of Hawaii

Via: Office of Procurement Management

From: Kim Siegenthaler, Office of the President
(Campus & Department/Program)

Vendor/Contractor: EAB

Estimated Amount: Estimated \$8 million

Term of Contract, if applicable: 5 years

Pursuant to University Administrative Procedure 8.220, and consistent with Hawaii Revised Statutes §103D-102(b)(4) and Hawaii Administrative Rules Chapter 3-120, the department requests a procurement exemption to purchase the following (attach additional sheets if necessary):

1. Description of the goods or services:

Licenses for a system-wide instance of the EAB Data Management Platform, Edify, and 10 university-specific instances of the EAB Student Success CRM, Navigate360 to support President Hensel's student success initiative.

2. Explain in detail, why it is not practicable or not advantageous for the University to procure by standard competitive means when multiple sources are available, or by other standard methods of source selection:

See Attached

3. Explain in detail, the process that will be or was utilized in selecting the vendor/contractor:

See Attached

4. Provide a description of the department's internal controls and approval requirements for the exempt procurement:

See Attached

5. Provide a list of department personnel, by position title, who will be involved in the approval process and administration of the contract:

Kim Siegenthaler, Senior Advisor
Blanche Fountain, Fiscal Manager, Budget and Finance
Garret Yoshimi, VP for Information Technology & CIO, Information Technology Services
Kalbert Young, VP for Budget and Finance & CFO, Chief Procurement Officer

6. Direct questions to: _____ Email Address: _____

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

Kim Siegenthaler

Full Name of Principal Investigator, Department Head, or Administrator

Kim Siegenthaler Digitally signed by Kim Siegenthaler
Date: 2025.04.17 15:17:20 -10'00'

Signature Date

Blanche Fountain

Full Name of Fiscal Administrator

Blanche Fountain Digitally signed by Blanche Fountain
Date: 2025.04.21 07:17:08 -10'00'

Signature Date

APPROVED:

Garret T. Yoshimi

Full Name of Vice President or Chancellor

Garret T. Yoshimi Digitally signed by Garret T. Yoshimi
Date: 2025.04.17 17:18:24 -10'00'

Signature Date

FOR OPM USE ONLY

OPM COMMENTS:

APPROVED DENIED

Sarah Allen Digitally signed by Sarah Allen
Date: 2025.05.15 15:26:50 -10'00'

CHIEF PROCUREMENT OFFICER, UNIVERSITY OF HAWAII

05/15/25

DATE

Attachment to Form 138, for licenses for EAB Navigate360 and EAB Edify

(2) Explain in detail, why it is not practicable or not advantageous for the University to procure by standard competitive means when multiple sources are available, or by other standard methods of source selection:

President Hensel is launching a university-wide student success initiative designed to eliminate student achievement gaps by creating a common standard of care for all students that gets them on track for graduation, keeps them on track, and intervenes when they get off track. Achieving this ambitious goal requires that faculty, staff, and students at every campus have access to modern technology built for this purpose and that facilitate analytics to support data-informed decision-making.

Navigate360 and Edify are completely proprietary to EAB. They offer unique student and staff facing tools and analytics capabilities, that when used together, provide unique benefits that are not available from any other vendor.

Navigate360 is purpose-built for higher education student success with the tools needed to increase retention and graduation. These capabilities were built from 15+ years of research into higher education retention best practices conducted by EAB. This intellectual property is the foundation upon which Navigate360 was designed and no other company can develop comparable capabilities as they do not have access to EAB's proprietary material. Examples of these capabilities include:

- Population Health Analytics – a dashboard based on EAB's research into Population Health Models of advising with KPIs from our Academic Vital Signs research
- Predictive Scoring – a predictive modeling framework built from EAB's research into the factors most predictive of student outcomes.
- Study Buddies – a feature designed to connect students in classes

Navigate360 is the only Student Success CRM that establishes a true Coordinated Care Network, facilitating seamless, campus-wide interconnectivity among student support offices and departments. Navigate360's modules are fully integrated on a single platform, empowering University of Hawaii System to share critical data across administrators, staff, advisors, faculty, and students.

Navigate360 is designed to support postgraduation career success. It does this by connecting with EAB's proprietary career exploration and placement platform Forage (embedded into Navigate360) where students can access 350+ best-in-class virtual job simulations and career preparation tools from Forage's more than 100 partners, including Fortune 500 organizations such as Citibank, Goldman Sachs, KPMG, Lululemon, PepsiCo, and many other leading brands. Students who take Forage job simulations are twice as likely to secure interviews and positions at top companies than those who do not. Navigate360 is the only CRM intentionally driving students to the Forage platform to help bridge the gap between college and career.

Edify creates a shared implementation workspace for completing the up-front installation of Navigate360. UH staff can collaborate on SQL scripts with EAB employees to populate the data into Navigate360. Given Navigate360 is a proprietary EAB product no other technology or combination of technologies can match EAB's out of the box scripts and degree of transparency.

Edify integrates with any institutional system or dataset available at UH or through our other organizational partners, along with Navigate360. As such, it is capable of integrating new data sets into

Navigate360 from these systems and populating Navigate360 with expanded data sets that are not available with other student success technologies.

Edify comes with pre-built APIs that will allow UH to export the SQL codes governing the data in Navigate360. This means that UH will be able to access a complete data extract from Navigate360 at any time. This makes the data in Navigate360 accessible to a degree that no other student success technology can match. The portability of this data will enhance Navigate360's interconnectedness with other campus systems by making the complete set of native data in Navigate360 on student success and engagement accessible to other institutional systems. The portability of the SQL codes guarantees that work UH puts into implementation is accessible to them even if they discontinue partnership.

As the developer of Navigate360, EAB has the most complete understanding of the data in this system of any vendor on the market. Data repositories and governance structures are built in Edify with a comprehensive understanding of Navigate360 data which enables more effective management of Navigate360 in Edify than is possible with any other vendor.

Edify is the only provider of a higher education standard, proprietary data model that enables a first-of-its-kind approach that is both standardized and configurable. Within the platform, data is organized by higher education-specific business entities, combining information from disparate data sources, and informed by delivering student success technologies to 850+ colleges and universities. Edify's proprietary Quad data model was built around core higher education concepts, including concepts specific to student success that were developed from our experience designing and delivering student success technology. As a result, through Edify, EAB provides a higher education-specific data model that is better able to support student success technologies in advancing retention efforts than other available data platforms.

Edify and Navigate360 are uniquely capable of working together to provide reporting and analytics tools to facilitate data driven decision making across UH. This combination of technologies is not available from any other vendor.

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

The Navigate360 platform is widely recognized as the gold standard for supporting student success in higher education and Edify is designed to serve a complementary function that will enable UH to pool and analysis data in a holistic and comprehensive manner that we are unable to do with our current data structure and governance. As no other vendor can offer comparable capabilities, a competitive process would result in the same outcome but with a substantial delay in our ability to begin critical work to improve student success across UH campuses.

(4) Provide a description of the Department's internal controls and approval requirements for the exempted procurement:

The department's fiscal management, provided by the UH System fiscal administration function under the VP for Budget and Finance and CFO, provides shared services for UH System offices including the President's Office. Its fiscal manager, Blanche Fountain, will oversee the internal controls and approvals for the procurement. Kim Siegenthaler, Senior Advisor to the President, is the liaison and lead project manager for the University with EdSights. In addition, Garret Yoshimi, the VP for Information Technology and CIO, will assist with oversight of the procurement and successful integration of the software into the University ensuring compliance with policies and process.