

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 Vice President for Information Technology Services/CIO (Department/Campus)

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

Services to perform market analysis and research on a set of 100 University of Hawaii programs to identify portfolio opportunities for growth, including resource allocation to achieve highest potential monetization and market share gains for the identified University of Hawaii academic programs.

Vendor/Contractor: UPCEA dba University Professional Continuing Education Association
(If known)

Address:
One Dupont Circle, Suite 450
Washington, DC 20036

Term of Contract: (If known)	From: To be determined	To: To be determined	Cost: \$24,900.00
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Direct any inquiries to:

Department: Office of the Vice President for Information Technology/CIO

Contact Name/Title: Garret T. Yoshimi, Vice President for Information Technology/CIO

Address: 2520 Correa Road
Information Technology Center, 6th Floor
Honolulu, Hawaii 96822

Phone Number:
(808) 956-3501

Fax Number:
(808) 956-7322

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:** April 14, 2025
Chief Procurement Officer, University of Hawaii

Via: Office of Procurement Management

From: Information Technology Services
(Campus & Department/Program)

Vendor/Contractor: UPCEA dba University Professional Continuing Education Association

Estimated Amount: \$24,900

Term of Contract, if applicable: _____

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:

UPCEA Research and Consulting will perform market analysis and research on a set of 100 UH programs to identify portfolio opportunities for growth, including resource allocation to achieve highest potential monetization and market share gains for the identified UH academic programs. The work consists of county level data gathering and development of the Portfolio Decision-Making Model (PDMM) for the identified set of programs, followed by Occupational Mapping Analysis (OMA) to match target job roles and industry opportunities tied to the PDMM generated outcomes.

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:

UPCEA is a membership organization established to support the mission of higher education. The UPCEA Research and Consulting team focuses solely on the higher education market, to provide market research, portfolio analysis, and consulting services in support of institutional missions. The UPCEA Research and Consulting team has a history of conducting portfolio market studies and analysis for higher education institutions in the same size and classification as UH. The proprietary approach combines the specific experience and skills of the UPCEA Research and Consulting team, to apply the expertise of the individual team members, together with their combined experience serving higher education institutions, to deliver unique capabilities for portfolio analysis and market analytics; both capabilities utilize proprietary models and frameworks generated over the collective experience of the organization. The organization has limited administrative overhead operations and has been frustrated and unable to complete its HCE compliance due to non-responsiveness by both the IRS and Hawaii DoTax organizations.

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

The request for this analysis to be provided by UPCEA is at the request of President Hensel. Kim Siegenthaler will act as the UH lead for the project, and has direct and recent experience with the UPCEA organization and its proprietary, high-value practices that are specific to higher education institutions and our institutional markets. No other entity had proved to have similar capabilities, nor similar experience and knowledge of the higher education market as UPCEA.

4. Provide a description of the department's internal controls and approval requirements for the exempt 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 ITS. Its fiscal manager, Blanche Fountain, will oversee the internal controls and approvals for the procurement. In addition, Garret Yoshimi, the VP for Information Technology and CIO, will also oversee the procurement, acquisition of services, and controls over the procurement and operations to ensure proper compliance with our processes.

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: Garret 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

Garret T. Yoshimi Digitally signed by Garret T. Yoshimi
 Date: 2025.04.11 16:35:38 -10'00'
 Signature Date

Blanche Fountain
 Full Name of Fiscal Administrator

Blanche Fountain Digitally signed by Blanche Fountain
 Date: 2025.04.11 19:16:49 -10'00'
 Signature Date

04/11/25

APPROVED:

Garret T. Yoshimi
 Full Name of Vice President or Chancellor

Garret T. Yoshimi Digitally signed by Garret T. Yoshimi
 Date: 2025.04.11 16:35:50 -10'00'
 Signature Date

FOR OPM USE ONLY

OPM COMMENTS:

APPROVED DENIED

Sarah Allen Digitally signed by Sarah Allen
 Date: 2025.05.06 12:23:56 -10'00'
 CHIEF PROCUREMENT OFFICER, UNIVERSITY OF HAWAII

05/06/25
 DATE