

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

Purchase Order No. / Contract No. C240088

Name of Contractor: Clark/Nikdel, Inc dba Echo Delta

Description of goods or services:

To develop and implement a comprehensive strategic enrollment plan to include facilitating a phased implementation, examining the academic portfolio, diagnosing enrollment challenges and opportunities, setting goals and priorities, and establishing an implementation structure.

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

To incorporate "Enrollment Management Support and Coaching" which will provide hands on coaching support for the University of Hawaii at Hilo Admission Team, with the main focus on recruitment efforts.

Original Purchase Price:
\$ 230,000.00

Amended Purchase Price:
\$ 258,000.00

Direct any inquiries to:

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

Contact Name/Title: Chelsey Grant, Fiscal Specialist

Address: 200 W. Kawili Street, SSC W-303
Hilo, Hawaii 96720

Phone Number:
808-932-7648

Fax Number:
808-932-7471

Date Posted: June 6, 2025

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 Young **Date:** 06/05/25
Chief Procurement Officer, University of Hawaii

Via: Office of Procurement Management

From: University of Hawaii at Hilo, Division of Student Affairs
(Campus & Department/Program)

Vendor/Contractor: Clark/Nikdel, Inc. DBA Echo Delta

Contract No./Purchase Order No.: C240088/PO 278243

Original Purchase Price: \$ \$230,000.00 **Amended Purchase Price:** \$ \$258,000.00

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:

Echo Delta is providing a comprehensive Strategic Enrollment Management (SEM) Plan for UH Hilo. The contract involves establishment of a SEM planning team including UH Hilo team members, Echo Delta site visits to meet key campus community stakeholders and gather input through town hall meetings and focus groups, staff training on new strategies initiatives, and check-ins with task forces and working groups.

2. Explain in detail what is being amended:

In addition to the already approved contract (C240088), we are requesting to include the "Enrollment Management Support and Coaching" piece which will provide hands on coaching support to UH Hilo's Admission team, with the main focus on recruitment efforts. The addition to the scope will also help to address the day-to-day operational needs of the department, to include high-touch guidance, real-time decision-making support, and frontline coaching to the Admission staff and leadership.

See attached proposal from Echo Delta for additional details on the scope of work.

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

*See Attached.

4. Direct questions to: Chelsey Grant Email Address: cnishiok@hawaii.edu

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

Lei Kapono, Interim VCSA
Full Name of Principal Investigator, Department Head, or Administrator

Lei Kapono Digitally signed by Lei Kapono
Date: 2025.06.05 12:34:58 -10'00'
Signature Date

Chelsey Grant
Full Name of Fiscal Administrator

Chelsey Grant Digitally signed by Chelsey Grant
Date: 2025.06.06 08:06:48 -10'00'
Signature Date

APPROVED:
Bonnie Irwin, Chancellor UHH
Full Name of Vice President or Chancellor

Bonnie D. Irwin Digitally signed by Bonnie D. Irwin
Date: 2025.06.06 10:43:41 -10'00'
Signature Date

FOR OPM USE ONLY

OPM COMMENTS:

APPROVED DENIED

Sarah Allen Digitally signed by Sarah Allen
Date: 2025.06.18 11:09:02 -10'00'

CHIEF PROCUREMENT OFFICER, UNIVERSITY OF HAWAII

DATE



Explanation for the reasons that the amendment is necessary:

The proposed amendment to the Echo Delta contract is directly related to the original scope and intent of the Strategic Enrollment Management (SEM) engagement. The original contract was established to guide UH Hilo through the development and phased implementation of an SEM plan focused on improving recruitment, admissions, and retention outcomes. This included identifying strategic goals, aligning institutional resources, and creating sustainable structures to support enrollment growth. A core component of that scope was not just planning but also preparing the campus for successful execution—through training, cross-functional coordination, and continuous improvement.

The enrollment support services proposed in this amendment represent a natural and necessary extension of the original engagement. As UH Hilo enters the early stages of SEM implementation—specifically during a critical period of leadership transition—the need for high-touch, tactical support becomes essential. The coaching and operational support offered through this amendment will ensure continuity and real-time execution of strategies previously developed under Echo Delta’s guidance. These services do not constitute a shift in direction but rather reinforce the foundational goal of the original contract: to improve institutional enrollment outcomes through capacity-building, staff development, and actionable implementation.

This amendment builds directly on several aspects already embedded in the contract’s approved scope. For example, Phase II and III explicitly reference training on new strategies, alignment of school and campus-level tactics, and continued staff development. Phase V highlights fostering a culture of collaboration and continuous improvement—precisely what this coaching engagement is designed to advance. The same personnel providing strategic planning support will now apply their insight to operational execution, bridging the gap between plan and practice.

Rather than a new initiative, this enrollment support engagement enables UH Hilo to move from strategy formulation to strategy execution, reinforcing the existing SEM plan with targeted, short-term assistance during a high-risk transitional period. In this way, the amendment fulfills and extends the original contract’s objectives while ensuring that SEM implementation stays on track and aligned with institutional priorities.



ECHO DELTA

May 29, 2025

Enrollment Management Support & Coaching

University of Hawaii at Hilo

Clark/Nikdel Inc. dba Echo Delta
62 4th Street NW Winter Haven, FL 33881
863.877.3347 | echodelta.co

Enrollment Management Support & Coaching - Admissions & Recruitment

Length of Engagement: 1 month (July 1, 2025 - July 31, 2025)

Objective

This engagement provides targeted enrollment management consulting and **hands-on coaching support** to the University of Hawai'i at Hilo (UH Hilo), specifically focused on **undergraduate admissions and recruitment operations**. Unlike the broader strategic enrollment management (SEM) planning previously completed—which focused on long-term strategy, structure, and institutional alignment—this additional scope of work is designed to address **day-to-day operational needs** and provide immediate, tactical support during a time of key leadership transitions.

With the **Vice Chancellor and Associate Vice Chancellor for Enrollment Management positions currently vacant**, this engagement will offer high-touch guidance, real-time decision-making support, and frontline coaching to admissions staff and leadership. The primary goal is to ensure continuity, build team capacity, and maintain momentum across critical admissions functions while the university searches for permanent leadership.

Scope of Services

Our consultants - primarily Jeff Kallay, backed up by Scott Rhodes and Michelle Rhodes - will focus on supporting and coaching UH Hilo's admissions leadership and team in the following areas:

Admissions Operations & CRM Optimization

- Provide hands-on support for ongoing CRM challenges, including issue resolution, process clarification, and workflow adjustments in Slate.
- Offer coaching on best practices for admissions workflows, communication sequencing, and integration of recruitment strategies within the CRM.
- Assist the admissions team in navigating broader University of Hawai'i System-level discussions regarding potential CRM replacements, offering insight into readiness, transition planning, and institutional impact.
- Support efforts to improve the applicant experience by optimizing internal processes, automating routine functions, and enhancing team productivity through better use of existing tools.

Staff Support and Coaching

- Deliver consistent coaching to the Director of Admissions and frontline recruiters.
- Act as a strategic partner to interim leadership on staff development, operational decisions, and tactical execution.

- Offer recommendations on staffing structure, training, and performance enhancement to strengthen internal capacity.

Communication & Yield Strategy Support

- Review current communications and engagement tactics; provide actionable suggestions for improvement.
- Coach staff on executing effective yield campaigns, including event planning, outreach strategies, and segmented follow-up.

Data-Driven Recruitment Coaching

- Provide guidance on interpreting admissions and recruitment data to inform strategy and decisions.
- Recommend key performance indicators (KPIs) to monitor activity and outcomes across the funnel.
- Support the development of a data-informed culture within the admissions office, with practical strategies for goal setting and team accountability.

Deliverables

- Customized coaching plans and regular meeting agendas responsive to UH Hilo's evolving needs
- Written summaries of recommendations and action items following coaching sessions, as needed
- End-of-month progress brief highlighting key accomplishments, challenges, and upcoming priorities
- Final summary memo including coaching outcomes and recommended next steps for continued progress

Time Commitment & Format

- 3-4 days of on-campus presence at UH Hilo in July 2025 for onboarding, observation, and key stakeholder meetings (travel costs are included)
- Twice-weekly virtual meetings with admissions and enrollment staff for real-time support and coaching
- Ongoing availability via email and phone for responsive, just-in-time consultation
- Consultant will require access to relevant staff, systems (e.g., Slate), data, and documentation throughout the engagement

Cost Summary

DESCRIPTION	SUBTOTAL
Enrollment Management Support and Coaching for UHH's Admissions & Recruiting Team	\$36,000 \$28,000
Discount applied to account for single month support, and to account for overlap in existing SEM consulting contract.	Discount (\$) -8000
Payment Terms: Invoice will be issued on July 1, 2025. NET 30 payment terms.	
Additional months support with a similar scope of work will be billed at \$16,000 per month, assuming in-person travel is not required. Echo Delta is assuming that, should these additional services be needed, the fees will be included in a separate contract / scope of work.	
TOTAL	\$28,000
<i>Total Savings</i>	\$8,000

Client Approval

Client Signature	Printed Name	Title	Date
------------------	--------------	-------	------

TERMS & CONDITIONS

University of Hawaii at Hilo ("Client") is hiring Clark/Nikdel, Inc. (d/b/a Echo Delta) to perform these services on a non-hourly, fixed-fee basis in accordance with the Services Agreement between Echo Delta and Client, which remains in full force and effect. This fixed-fee quote governs this Project only. Any work occasioned by changes made to the project after the date of this Agreement shall be billed on an hourly basis unless otherwise agreed upon in writing. No guarantee regarding increased enrollment is expressed or implied. Proposal expires 60 days after date noted above.