

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

The President, University of Hawaii, is in the process of reviewing the request from Information Technology Services (for UH Manoa Enrollment Management) (Department/Campus) for exemption from Chapter 103D, HRS, for the following goods and services:  
One year license subscriptions for Salesforce CRM, and Salesforce Pardot campaign management services to support comprehensive outreach and communications requirements for the University of Hawaii at Manoa Enrollment Management Office, in support of student recruitment, enrollment, retention and outreach.

<b>Vendor:</b> Salesforce.Org (If known)	akaCRM Inc.
<b>Address:</b> 50 Fremont Street, Suite 300 San Francisco, California 94015	6510-A S. Academy Boulevard, #258 Colorado Springs, Colorado 80906

<b>Term of Contract:</b> (If known)	From: To be determined	To: To be determined	Cost: \$65,040 (SalesForce.org) plus \$37,140 (akaCRM Inc.)
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<b>Direct any inquiries to:</b> Department: Information Technology Services	Phone Number: (808) 956-3501	
Contact Name/Title: Vice President for Information Technology and Chief Information Officer		Fax Number: (808) 956-7322
Address: 2520 Correa Road Information Technology Center, 6th Floor Honolulu, Hawaii 96822		

Date Posted: July 2, 2020

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:** Information Technology Services (for UH Manoa Enrollment Management)  

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(Department/Program)

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

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

One year license subscriptions for Salesforce CRM, and Salesforce Pardot campaign management services to support comprehensive outreach and communications requirements for the UH Manoa Enrollment Management office, in support of student recruitment, enrollment, retention and outreach. The current tools include the Ellucian CRM product (nearing the end of the current maintenance period), and a mix of ad hoc e-mail campaign tools such as MailChimp, as well as significant manual efforts that are currently overwhelmed by the volume of work that the office currently undertakes. The Salesforce subscriptions would be supplemented by onboarding support, training and Pardot configuration support by a Salesforce consulting partner (akaCRM) - the partner was recommended by Salesforce to match the UH Manoa Enrollment Management needs, and is highly qualified in the Salesforce Higher Education Architecture, and delivery of Pardot support for institutions.

**Estimated Cost:**     \$ 65,040 (SF) + 37,140 (aka)

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

Over the past decade, the UH Manoa Enrollment Management office has worked to procure a comprehensive CRM solution for its needs, and has not been able to successfully acquire one that can even come close to satisfying its business requirements - at a reasonable cost. The current situation is a result of that challenge, and includes multiple piece-meal products, with no comprehensive strategy, nor long-term solution. The proposed Salesforce/Pardot solution is based on the highly successful pilot efforts of the UH Community College system using the same baseline solution, in a very limited, pilot program, to support its online and returning adult programs. Procurement by competitive means would also not allow UH to secure the specific terms and conditions that we need, available only through a direct subscription from Salesforce would provide - in addition, we are also able to maximize available discounts by not having to utilize any of the Salesforce reseller channels. Traditional competitive procurement efforts would also result in solutions that may not be optimum for our needs, as evidenced by the prolonged, multi-year effort that resulted in the current situation. (continued)

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

Based on a decade of experience that included a standard competitive procurement effort, and together with experiences of the Enrollment Management staff, and the successful experience of the pilot Community College effort, we have examined a broad range of solutions available in the market, and have selected this specific approach based on the match with our needs, the experience of the team, and importantly, the affordability of the solution - consistent with funds already expended for the Ellucian CRM maintenance alone. The requested initial year of the use of the solution will also provide experience to confirm that the solution will work in the UH Manoa Enrollment Management operation, AND if necessary, better support a more traditional competitive procurement process if the solution is determined to be sub-optimal based on our one-year experience. In short, this affords the Enrollment Management operation a reasonable, extended trial of a highly regarded CRM solution to fit its critical needs.

(3) A description of the Department's internal controls and approval requirements for the exempted procurement; and  
 Both ITS and UH Manoa Enrollment Management executive management will have oversight of the process, implementation and controls to ensure the process is effective, and that UH procedures and policies are properly followed.

(4) A list of Department personnel, by position title, who will be involved in the approval process and administration of the contract:  
 Craig Shinsato, ITS FA; Scott Yamashita, ITS Administrative Manager; Garret Yoshimi, VPIT/CIO, ITS; Roxie Shabazz, AVC Enrollment Management, UHM.

Direct questions to: Garret Yoshimi Phone: 956-3501

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

Roxie Shabazz  
 Full Name of Principal Investigator, Department Head, or Administrator

Roxie M. Shabazz 6/25/2020  
 Signature Date

Craig Shinsato  
 Full Name of Fiscal Administrator

Craig A Shinsato 06/30/2020  
 Signature Date

APPROVED:

Garret Yoshimi  
 Full Name of Vice President or Chancellor

Garret T. Yoshimi 6/24/2020  
 Signature Date

FOR OPM USE ONLY

OPM COMMENTS:

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APPROVED  DENIED

David Lassner

Digitally signed by David Lassner  
 Date: 2020.07.14 00:25:47 -10'00'

7/14/2020

PRESIDENT, UNIVERSITY OF HAWAII

DATE

Request for Exemption from Chapter 103D, HRS  
SalesForce CRM/Pardot and akaCRM support services

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

(continued) The current COVID-19 pandemic situation has exacerbated the already critical need for the UH Manoa Enrollment Management team to increase its productivity, efficiency and effectiveness as their success directly impacts student engagement with UH Manoa, and the tuition bottom-line. Conducting another round of standard competitive procurement would not be able to generate any material results until (optimistically) 2021 or 2022. The proposed SalesForce CRM/Pardot and akaCRM solution is expected to deliver the needed services this Fall (September/October). This timely execution is absolutely critical to the ongoing viability of the Enrollment Management program.