

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

The President, University of Hawaii, is in the process of reviewing the request from  
Office of the Vice President for Information Technology and Chief Information Officer (Department/Campus)  
for exemption from Chapter 103D, HRS, for the following goods and services:  
Implementation and migration from Ellucian Operational Data Store to Ellucian Insight and Experience data  
warehouse as a service.

**Vendor:** Ellucian Company LLC  
(If known)  
**Address:**  
4 Country View Road  
Malvern, Pennsylvania 19355

<b>Term of Contract:</b> (If known)	From: To be determined	To: To be determined	Cost: \$870,000.00 (estimated)
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<b>Direct any inquiries to:</b> Department: Office of the Vice President for Information Technology and Chief Information Officer Contact Name/Title: Susan Inouye, Director, Enterprise Systems Address: 2520 Correa Road Information Technology Center, 6th Floor Honolulu, Hawaii 96822	Phone Number: (808) 956-8380  Fax Number: (808) 956-2412
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Date Posted: April 26, 2024

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: Office of the Vice President for Information Technology Services/Chief Information Officer  
(Department/Program)

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

Description of goods, services, or construction:  
See attachment.

Estimated Cost: \$ See attachment.

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

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

(3) A description of the Department's internal controls and approval requirements for the exempted procurement; and  
See attachment.

(4) A list of Department personnel, by position title, who will be involved in the approval process and administration of the contract:  
See attachment.

Direct questions to: Susan Inouye Phone: 808-956-8380

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

Susan Inouye, Director, Enterprise Systems  
Full Name of Principal Investigator, Department Head, or Administrator

Susan K. Inouye Digitally signed by Susan K. Inouye Date: 2024.04.25 16:00:40 -10'00' 4/25/2024  
Signature Date

Blanche Fountain, Director, System Admin Srvc  
Full Name of Fiscal Administrator

Blanche Fountain Digitally signed by Blanche Fountain Date: 2024.04.26 07:46:01 -10'00' 4/26/24  
Signature Date

APPROVED:

Garret Yoshimi, VP for Info. Tech. Service/CIO  
Full Name of Vice President or Chancellor

Garret T. Yoshimi Digitally signed by Garret T. Yoshimi Date: 2024.04.26 07:18:35 -10'00' 4/26/2024  
Signature Date

FOR OPM USE ONLY

OPM COMMENTS:

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APPROVED  DENIED

David Lassner Digitally signed by David Lassner Date: 2024.05.16 12:09:06 -10'00'  
PRESIDENT, UNIVERSITY OF HAWAII

05/16/24  
DATE

**REQUEST FOR EXEMPTION FROM CHAPTER 103D, HRS  
MIGRATION TO ELLUCIAN INSIGHT AND EXPERIENCE  
FOR INFORMATION TECHNOLOGY SERVICES, UNIVERSITY OF HAWAII**

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

Implementation and migration from Ellucian Operational Data Store to Ellucian Insight and Experience data warehouse as a service.

**Estimated Cost:** \$870,000.00 (estimated)

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

The Insights and Experience product offering by Ellucian replaces the soon to be withdrawn, end-of-life Operational Data Store (ODS) product that is currently in-use, and critical to the operations of all campuses and the UH System for institutional reporting, compliance reporting and measuring outcomes of programs, units and campus academic operations. The end-of-life for ODS means that Ellucian will no longer be offering upgrades and improvements and will be announcing an “end of life” date for ODS.

ODS is the University’s data mart containing data from Banner Student Information Systems (“Banner”) and is widely used for reporting throughout the University. The University needs to find a replacement for ODS. In addition, the current ODS product was purposely-built for Banner reporting, and is structured to specifically accept and maintain historical data from Banner; this includes time critical snapshot data tied to periodic compliance reporting.

Ellucian has released Insights/Experience as the potential successor product to ODS, to offer an enhanced set of features and capabilities of ODS, specifically crafted to support the required compliance and regulatory reporting needs of institutional student information systems (Banner for UH).

Insights and Experience will allow the University access to data in near real-time basis with the functionality of having an integrated reporting and visualizations tool, potentially allowing the University to replace other 3<sup>rd</sup> party applications. Migration to Insights and Experience would allow for an intelligent integration to Banner.

Insights and Experience is the sole successor product offering by Ellucian, that will also continue to be supported by Ellucian as the University expects to continue to be a Banner institution for the future. As such, the Ellucian Insights/Experience is the only option that will allow us to continue without material impact to operations, and compliance/regulatory reporting. Other solutions were not and cannot be pursued as this is the sole offering from Ellucian that is tied to our Banner student information system.

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

Although it has been determined that Insights and Experience may be the only option that will allow Banner to continue without material impact to operations, and compliance/regulatory reporting, the University will engage with Ellucian on a proof of concept project before fully committing to Ellucian's replacement offering. This proof of concept project will be for the University of Hawaii at Manoa and University of Hawaii-West Oahu campuses only.

Insights in combination with Experience will offer to the University the following:

- A pathway for migrating from ODS to Insights;
- Single interface providing timely information within a personalized dashboard;
- Seamlessly unifies Ellucian products, partner applications, and UH data;
- Experience native Insights Reporting Tool or UH's 3<sup>rd</sup> party reporting tools of choice;
- Data Connect Designer and Experience Toolkit, which are tools we currently do not have but will be extremely beneficial; and
- Positioning the University to finally obtain a system-wide data warehouse, now being called a "data lake."

Being a potential early adopter of Insights and Experience, the University has the ability to influence Ellucian to include some of the University's requirements into their product offering and incorporate these into Ellucian's release schedule.

If the University is unable to pursue this proof of concept project, the University would miss a window of opportunity to provide requirements and suggestions to Ellucian for their Insights/Experience product roadmap that would directly benefit the University. This pilot project lays the foundation for migrating off ODS before ODS is decommissioned. If we do not move forward with this project, the University will miss the opportunity to position ourselves to finally get a fully functional data warehouse ("data lake"), ETL, and BI/Reporting to satisfy the enormous amounts of executive, legislative, internal, and external reporting requirements.

The University will negotiate a final agreement with Ellucian to ensure that the total cost of the project are kept to a minimum and are fair and reasonable to the University. In addition, the University will also contribute information technology services staff resources to assist with the project which will assist in reducing the overall cost to the University for the project.

**(3) A description of the Department's internal controls and approval requirements for the exempted procurement.**

For this exempted procurement, internal controls and approval requirements will be implemented to ensure compliance with university policies and regulations. The Office of Procurement Management will assist in reviewing the contract for services with Ellucian and ensure vendor compliance. Information Technology Services managers will oversee the work performed by the Contractor and all expenditures will be subject to review, approval and processing in conformity with the specifications and requirements of the contract, and University expenditure policies and procedures.

**(4) A list of Department personnel, by position title, who will be involved in the approval process and administration of the contract**

Garret Yoshimi, Vice President for Information Technology Services and Chief Information Officer

Susan Inouye, Director, Enterprise Systems

Lianne Iwanaga-Ohashi, Senior Information Technology Specialist  
Office of Procurement Management