

**UNIVERSITY OF HAWAII
NOTICE OF EXEMPTION FROM CHAPTER 103D, HRS**

The President, University of Hawaii, is in the process of reviewing the request from Enrollment Mgt., Office of Student Affairs, UH Manoa & Division of Student Affairs, UH Hilo (Department/Campus) for exemption from Chapter 103D, HRS, for the following goods, services, or construction:
Consulting services to provide undergraduate and graduate enrollment growth solutions for the University of Hawaii at Manoa and the University of Hawaii at Hilo.

Vendor: EAB/Royall & Company
(If known)
Address: 1920 East Parham Road
Richmond, Virginia 23228

Term of Contract: (If known)	From: January 2018	To: June 2022	Cost: \$2,750,000 over 5 Years - UH Manoa \$2,000,000 over 5 Years - UH Hilo
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Direct any inquiries to: Department: Enrollment Management, Office of Student Affairs, UH Manoa Contact Name/Title: Roxie M. Shabazz, Assistant Vice Chancellor for Enrollment Management & Director of Admissions, UH Manoa Address: 2600 Campus Road, QLC 214 Honolulu, Hawaii 96822	Phone Number: (808) 956-3584 Fax Number: (808) 956-8095
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Date Posted: December 20, 2017

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 and Real Property Management
1400 Lower Campus Road, Room 15
Honolulu, Hawai'i 96822

RECEIVED

REQUEST FOR EXEMPTION FROM CHAPTER 103D, HRS 19 A11 51

TO: OFFICE OF PROCUREMENT AND REAL PROPERTY MANAGEMENT
 FROM: Enrollment Management, Office of Student Affairs, UHM / Division of Student Affairs, UHH
 (Department/Program)

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

Description of goods, services, or construction:

Consulting services are being sought to provide undergraduate and graduate enrollment growth solutions for the University of Hawaii at Manoa and the University of Hawaii at Hilo. Services shall include tracking of students and measurement of student behavior from pre-enrollment to post-enrollment via a comprehensive data system capable of interfacing with Banner; assistance with recruitment and retention using a predictive analytics platform; identification of parents via a national parent database in order to engage parents as a means towards enrolling and graduating students; and access to best practice research across all sectors of higher education.

Estimated Cost: \$ UH Manoa \$2,750,000 over 5 years; UH Hilo \$2,000,000 over 5 years

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

Procurement by standard competitive means, involving the preparation and advertising of a formal request for proposals, will not permit the campuses to enter into a contract in time to impact Fall 2018 enrollment figures. Enrollment for both UHM and UHH has declined in recent years. UHM Fall 2017 enrollment fell by 2.5% as compared to Fall 2016 enrollment; UHH Fall 2017 enrollment fell by 3.5% as compared to Fall 2016 enrollment. Potential students are currently deciding where to apply for Fall 2018 admission. Entering into contracts for UHM and UHH, respectively, with services to begin in January 2018 is necessary to begin positively impacting recruitment and retention rates for Fall 2018.

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

In anticipation of the time constraints applicable to this procurement, UHM and UHH have conducted an informal survey of consulting firms that provide enrollment management services. The companies were asked whether they could provide the four essential components listed in the description of services above (comprehensive data system, predictive analytics platform, national parent database, and access to best practice research). The following nine companies were surveyed by Farrah-Marie Gomes, Vice Chancellor for Students Affairs, University of Hawaii at Hilo: EAB/Royall & Company, Capture Higher Ed, Fire Engine RED, Ruffalo Noel Levitz, SEM Works, Spark451, TWG Plus, Waybetter Marketing, and Whiteboard Higher Education. The results of the survey were evaluated by VC Gomes and by Roxie Shabazz, Assistant Vice Chancellor for Enrollment Management & Director of Admissions, UHM. A table showing a comparative analysis of the services offered by the nine companies is attached. EAB/Royall & Company is identified as the only firm capable of providing all of the four essential components.

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

The Office of Procurement and Real Property Management will assist in reviewing the contracts for services with EAB/Royall & Company to match the needs of the two campuses and that will be most advantageous to the University. Expenditures will be subject to review, approval, and processing in conformity with specifications of the contracts 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:

Roxie Shabazz, Asst. VC for Enrollment Management & Director of Admissions, UHM
Robynn Yokooji, Fiscal Administrator, Enrollment Management, UHM
Alexandra French, Director of Finance & Accounting, UHM
Farrah-Marie Gomes, VC for Student Affairs, UHH
Carrie Masanda, Director of Contracts and Procurement, UHH

Direct questions to: Roxie M. Shabazz Phone: 956-3584

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

Roxie Shabazz, UHM/Farrah-Marie Gomes, UHH
Full Name of Principal Investigator, Department Head, or Administrator

Roxie M. Shabazz 12/18/17
Farrah-Marie Gomes 12/16/17
Signature Date

Robynn Yokooji, UHM / Carrie Masanda, UHH
Full Name of Fiscal Officer

Robynn Yokooji 12.18.17 / Carrie Masanda 12/15/17
Signature Date

APPROVED:

David Lassner, Interim Chancellor, UHM / Marcia Sakai, Interim Chancellor, UHH
Full Name of Vice President or Chancellor

David Lassner 12/14/17 / Marcia Sakai 12/18/17
Signature Date

FOR OPRPM USE ONLY

OPRPM COMMENTS:

APPROVED _____ DENIED

David Lassner
PRESIDENT, UNIVERSITY OF HAWAII

1/11/18

DATE

Request for Exemption from Chapter 103D, HRS
 Contractor: Royall Company

Description of Services: Consulting Services to provide undergraduate and graduate enrollment growth solutions for the UHM and UHH

Survey of Enrollment Management Consulting Firms - December 2017

	<u>EAB Royall</u>	<u>Capture</u>	<u>Fire Engine Red</u>	<u>Ruffalo Noel-Levitz</u>	<u>SEM Works</u>	<u>Spark451</u>	<u>twapius</u>	<u>Waybetter Marketing</u>	<u>Whiteboard</u>
Services Provided									
National parent database that will allow us to link parental information with prospective student data, for more reliable parent data and to better manage communication and engage parents	Yes	No	No	No	No	No	No	No	No
Comprehensive data system through which students can acquire and be tracked through application and yield with full integration of data from pre-enrollment to post-enrollment	Yes	Yes	In development	No	Yes	Yes	Yes	No	No
A predictive analytics platform to assist with both recruitment and retention	Yes	No	Yes	Yes	Yes	Yes	Yes	Yes	Yes
Access to best practice research across all sectors of higher education (EM, AA, SA, SS etc)	Yes	Only Enrollment Management	Yes	Yes	Only Enrollment Management	No	No	No	No