
UNIVERSITY OF HAWAII
REQUEST FOR EXEMPTION FROM CHAPTER 103D, HRS

To: Kalbert Young **Date:** 9/19/25
Chief Procurement Officer, University of Hawai'i

Via: Office of Procurement Management

From: Kim Siegenthaler, Office of the President
(Campus & Department/Program)

Vendor/Contractor: EAB

Estimated Amount: Estimated \$763,0000

Term of Contract, if applicable: 4 years

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:

Strategic Advisory Services Core Partnership for Research Institutions to support President Hensel's student success initiative.

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:

See Attached

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

See Attached

4. Provide a description of the department's internal controls and approval requirements for the exempt procurement:

See attached.

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
Kalbert Young, VP for Budget and Finance & CFO, Chief Procurement Officer
Office of Procurement Management

6. Direct questions to: _____ Email Address: _____

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

Kim Siegenthaler

Full Name of Principal Investigator, Department
Head, or Administrator

Kim Siegenthaler Digitally signed by Kim Siegenthaler
Date: 2025.09.22 08:12:06 -10'00'

Signature Date

Blanche Fountain

Full Name of Fiscal Administrator


Blanche Fountain Digitally signed by Blanche Fountain
Date: 2025.09.22 08:26:51 -10'00'

Signature Date

APPROVED:

Amy Luke

Full Name of Vice President or Chancellor

 Digitally signed by Amy Luke
Date: 2025.09.22 08:31:37 -10'00'

Signature Date

FOR OPM USE ONLY

OPM COMMENTS:

APPROVED DENIED

CHIEF PROCUREMENT OFFICER, UNIVERSITY OF HAWAII

DATE

Attachment to Form 138, EAB Strategic Advisory Services CORE

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:

Procurement through standard competitive means is not practicable or advantageous due to EAB's unique and integrated value proposition, which is not available from any other single source. EAB's CORE model is superior to traditional, project-based consulting because it offers a **continuous partnership** rather than a one-time engagement. This model is designed for long-term partnerships that allow the university to address evolving needs and receive sustained guidance. Here's why the CORE model is a better value:

- **Proprietary Research and Data:** The CORE service is underpinned by EAB's extensive research, a vast network of sector leaders, and a library of peer-tested best practices. This data-driven foundation provides insights unavailable elsewhere, saving the institution significant resources that would be required for independent research. This also provides evidence-based, proven strategies that have yielded tangible results at peer institutions.
- **Dedicated, Expert Partnership:** The CORE model provides ongoing consultation with a team of subject-matter experts throughout the partnership, allowing for flexible support as needs change. This includes a dedicated Strategic Leader who serves as a long-term thought partner, ensuring sustained alignment with the President's initiative.
- **Holistic, System-Wide Support:** EAB's expertise extends across the entire UH system, providing resources that can be deployed to the president's leadership team, VCAAs, VCSAs, and other system-wide teams/committees to advance strategic initiatives, academic innovation, and administrative effectiveness.
- UH uses proprietary EAB technology platforms designed to support student success and data integration. Because EAB's advisors are experts in their own platforms, the strategic work is a direct extension of the university's existing technological capabilities, maximizing efficiency and avoiding a disjointed ecosystem of technology and advisory support. This seamless integration ensures that data-driven insights and actionable recommendations are immediately relevant to UH's specific student data.

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

The selection of EAB was not the result of a competitive bid but rather a determination based on a strategic needs analysis and the unique advantages of EAB's existing partnership with the University of Hawai'i. The process involved an assessment of the President's student success initiative requirements against the capabilities of potential vendors. The existing, successful

implementation and institutional commitment to EAB's Navigate360 and Edify platforms made it clear that EAB was the only vendor that could provide a solution that fully integrates with and maximizes the value of these prior investments. EAB's deep institutional knowledge and existing data-driven relationship with UH were the deciding factors.

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 the President's Office. Its fiscal director, Blanche Fountain, will oversee the internal controls and approvals for the procurement, and UH's Office of Procurement will provide additional oversight in the compliance with all laws and procedures. All expenditures under the contract will be subject to a rigorous review and approval process in conformity with the contract specifications and University expenditure policies and procedures. Fiscal administration will be overseen by the Fiscal Manager in Budget and Finance. Kim Siegenthaler, Senior Advisor to the President, is the liaison and lead project manager for the University with EAB.