

UNIVERSITY OF HAWAII NOTICE OF EXEMPTION FROM STANDARD METHODS OF SOURCE SELECTION

The Vice President for Budget and Finance/Chief Financial Officer, University of Hawaii, is in the process of reviewing the request from
Office of the Executive Vice President for Academic Affairs/Provost (Department/Campus) for exemption from Standard Methods of Source Selection for the following goods, services, or construction:

Hire a human resources/labor relations consultant to conduct a systemwide assessment of the current structures, staffing, policies, and practices, determine how effectively they are working, and recommend the most appropriate and effective human resources/labor relations system for the University.

Vendor: Daniel J. Julius
(If known)
Address: University of Alaska
Suite 202 Butrovich
P.O. Box 755320
Fairbanks, Alaska 99775-5320

Term of Contract: (If known)	From:	To:	Cost: \$23,000 (est.)
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Direct any inquiries to: Department: Office of Vice President for Academic Planning and Policy Contact Name/Title: Sandra Furuto/Director of Administration Operations Address: 2444 Dole Street, Bachman 204 Honolulu, Hawaii 96822	Phone Number: (808) 956-7487 Fax Number: (808) 956-6976
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Date Posted: May 19, 2011

Submit written objections to this notice to issue an exemption from Standard Methods of Source Selection, within seven (7) calendar days from the date posted to:

Office of Procurement and Real Property Management
1400 Lower Campus Road, Room 15
Honolulu, Hawaii 96822

REQUEST FOR EXEMPTION FROM STANDARD METHODS OF SOURCE SELECTION

TO: OFFICE OF PROCUREMENT AND REAL PROPERTY MANAGEMENT

FROM: Office of the Executive Vice President for Academic Affairs/Provost
(Department/Program)

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

Description of goods, services, or construction:

Hire a human resources / labor relations consultant to conduct a systemwide assessment of our current structures, staffing, policies, and practices, determine how effectively they are working, and recommend the most appropriate and effective human resources / labor relations system for our University.

Estimated Cost: \$ 23,000.00 (est.)

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

See attached.

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

See attached.

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

The EVPAA support staff will initially prepare required procurement documents in consultation with their system fiscal officer. All procurement documents will then be forwarded to the Executive VP for Academic Affairs for review and approval. The Systems Administrative Services Office will do a final review before approval.

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

Linda K. Johnsrud, EVP for Academic Affairs/Provost
Sandra Furuto, EVPAA Director of Admin Operations
Blanche Fountain, System Administrative Services Director

Direct questions to: Sandra Furuto Phone: 956-7487

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

Sandra Furuto Sandra Furuto 5/16/11
Full Name of Principal Investigator, Department Head, or Administrator Signature Date

Blanche Fountain Blanche Fountain 5/16/11
Full Name of Fiscal Officer Signature Date

APPROVED:

Linda K. Johnsrud Linda K. Johnsrud 5.16.11
Full Name of Vice President or Chancellor Signature Date

FOR OPRPM USE ONLY

OPRPM COMMENTS:

Recommend Approval

APPROVED DENIED

Howard Sobel 6/2/11
VICE PRESIDENT FOR BUDGET & FINANCE/CHIEF FINANCIAL OFFICER, UNIVERSITY OF HAWAII DATE

(1) Explanation describing how procurement by standard competitive means is either

not practicable or not advantageous to the University:

It is not advantageous for the University to utilize standard competitive means to solicit the intended services for the following reasons:

- (a) The set of knowledge and experiences being sought is very specific, and does not lend itself to a standard method of source selection. There are four key criteria that an individual must meet:
- A hard to find combination of human resources and labor relations / collective bargaining background;
 - Experience in higher education, specifically in a statewide system of diverse institutional types where human resources functions are decentralized;
 - Experience with the College & University Professional Association for Human Resources (CUPA-HR), the national authority on compensation surveys for higher education and the primary source of UH's executive salary schedule; and,
 - Familiarity with Hawai'i's collective bargaining laws (i.e., Chapter 89).

Individuals who are subject matter experts in each area are difficult to find, therefore, for one individual to have depth of experience in all of these areas is arguably unique. The consultant we have identified has many years of experience in the first area of human resources and labor relations / collective bargaining, as demonstrated in his attached vitae. He has over 35 years of experience in higher education and is currently the Vice President of Academic Affairs at the University of Alaska System, a highly diverse system like the University of Hawai'i. He was a former president of CUPA-HR. As a former arbitrator in Hawai'i, he is familiar with the state's collective bargaining laws.

- (b) Time is of the essence. It is critical for the University to streamline its human resources / labor relations functions as soon as possible.

Of serious concern is the growing number of Step 1 academic grievances

~~originating at the campuses and the uneven levels of faculty~~

centralized focus, particularly in areas with compliance issues involving the protection of sensitive information. The intent of this consultant's visit is to

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

Daniel J. Julius

daniel.julius@alaska.edu

(907) 750-1650

PROFESSIONAL EXPERIENCE

Vice President for Academic Affairs, University of Alaska System of Higher Education and Professor, School of Management, University of Alaska Fairbanks; 2007- present

Provost and Vice President for Academic Affairs, Professor, College of Management, Benedictine University (Illinois); 2003-2007

Visiting Fellow/Lecturer (Industrial Labor Relations and Human Resources) University of California; 2002-2003

Associate Vice President, Academic Affairs and Labor Relations, Professor, College of Professional Studies, University of San Francisco; 1986-2002

Assistant Vice Chancellor, Faculty and Staff Relations, California State University System, Office of the Chancellor; 1981-1985

Director of Personnel Services, Vermont State University System, Office of the Chancellor; 1978-1981

Director, Center for the Study of Higher Education, Teachers College, Columbia University; 1975-1978

TEACHING

Adjunct Professor/Lecturer, Dissertation Committee Member/Reader; Industrial Labor Relations, Human Resources, Higher Education Administration

Stanford University, Schools of Education and Business; 1992-2001

University of Toronto, Professional Studies; 1995-2000

University of Pennsylvania, School of Education; 2001

University of Hawaii, College of Professional Studies; 1992

University of New Hampshire, College of Business; 1992-1993

University of San Francisco, Schools of Management, Nursing and Liberal Arts; 1985-1990

San Diego State University, College of Management, 1984

Columbia University, Teachers College and School of Business; 1974-1978

FORMAL EDUCATION

Stanford University, Post Doctoral Fellow at the Center for Organizational Studies; 2000-2001.

Columbia University, M.A., Ed. D; 1975, 1978

Cornell University, Graduate Coursework, New York State School of Industrial Labor Relations; 1974-1975

The Ohio State University, B.A. 1972

PROFESSIONAL SERVICE AND RECOGNITION

Human Resources, Industrial Labor Relations, Arbitration, Mediation, Higher Education

Past President, College and University Personnel Association

Past President, Academy of Academic Personnel Administrators

Accreditation Team Member, University of Hawaii, Kent State University, Saint Mary's College,
University of Indianapolis

Academy of Management, Reader/Evaluator

American Education Research Association, Reader/Evaluator

HR Consultant, City and County of San Francisco, Michigan Technological University, Illinois Board of Regents, State University of New York, City University of New York, Oregon System of Higher Education, University of Maine System, University of Massachusetts System, University of Florida System, University of Illinois, Pennsylvania State Colleges and Universities, Embry Riddle Aeronautical University, Rhode Island School of Design, Providence College, University of California at Davis, San Diego, Merced, Lawrence Berkeley Laboratories, and UCLA, University of Alaska System, University of Montana System, University of New Hampshire System, University of British Columbia, Memorial University, Rutgers University

Advisory Boards, National Center for the Study of Collective Bargaining in Higher Education and the Professions, Hunter College, CUNY, TIAA-CREF, Nationwide Insurance, Metropolitan Life Insurance, Western Suburban College of Nursing (Chicago)

Recipient of Fulbright Awards, Kellogg Fellowship, Visiting Scholar, at International Labor Organization (Geneva), Catholic University, Spain, Sup de. Co., Graduate School of Management, Montpelier France Service Awards from Ministries of Education; Sultanate of Oman, Peoples Republic of China, Republic of Malaysia, and the Center for Higher Education Research and Development, University of Manitoba

US Representative and Board Member, Sino American Research Center, Shenyang Normal University, PRC

Alaska State Representative, ACT

PUBLICATIONS

Six books (edited or co authored) and one hundred and thirty articles in the areas of industrial relations, higher education, collective bargaining and world affairs. Editor of the Journal of the College and University Personnel Association for ten years.