

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

The President, University of Hawaii, is in the process of reviewing the request from University of Hawaii at Hilo, Division of Student Affairs \_\_\_\_\_ (Department/Campus) for exemption from Chapter 103D, HRS, for the following goods, services, or construction:  
Consultant services to evaluate and improve its work flow and functional processes on admission and financial aid life cycles and to accurately reflect those activities in the Banner student information System.

**Vendor:** To be determined.  
(If known)  
**Address:**

<b>Term of Contract:</b> (If known)	From: To be determined	To: To be determined	<b>Cost:</b> \$85,000.00 (est.)
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<b>Direct any inquiries to:</b> Department: University of Hawaii at Hilo, Division of Student Affairs  Contact Name/Title: Gail Makuakane-Lundin, Interim Vice Chancellor  Address: 200 W. Kawili Street, SSC W305 Hilo, Hawaii 96720-4091	<b>Phone Number:</b> (808) 932-7445  <b>Fax Number:</b> (808) 932-7471
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Date Posted: November 9, 2016

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

**REQUEST FOR EXEMPTION FROM CHAPTER 103D, HRS**

TO: OFFICE OF PROCUREMENT AND REAL PROPERTY MANAGEMENT

FROM: UH Hilo Division of Student Affairs  
(Department/Program)

UH-HILO  
BUSINESS OFFICE

16 OCT 17 AM 11:11

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

Description of goods, services, or construction:  
Please see attached.

Estimated Cost: \$ 85,000

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

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

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

Direct questions to: Gail Makuakane-Lundin Phone: (808) 932-7445

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

Gail Makuakane-Lundin  
Full Name of Principal Investigator, Department Head, or Administrator

*G. Makuakane-Lundin* 10/12/16  
Signature Date

Mason Kuo  
Full Name of Fiscal Officer

*Mason Kuo* 10/17/16  
Signature Date

APPROVED:

Donald Straney  
Full Name of Vice President or Chancellor

*Donald L. Straney* 13 Oct 16  
Signature Date

FOR OPRPM USE ONLY

OPRPM COMMENTS:

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\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

APPROVED  DENIED  
*David Bern*  
PRESIDENT, UNIVERSITY OF HAWAII

12/29/16  
DATE

**REQUEST FOR EXEMPTION FROM CHAPTER 103D, HRS  
OPRPM FORM 138  
(UH Hilo Division of Student Affairs)**

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

The University of Hawaii at Hilo (UH Hilo) Division of Student Affairs (DSA) is seeking consultant services to evaluate and improve its work flow and functional processes on admission and financial aid lifecycles and to accurately reflect those activities in the Banner student information system.

The consultant will provide services under the following three activities:

1. Complete a business process analysis (BPA) of the admission lifecycle at UH Hilo from application submission to enrollment. The BPA will map, analyze, and comment on the existing admission process. The BPA will recommend tactical process changes to capitalize on technology, streamline general operations, eliminate unnecessary redundancy, increase automation where possible, and decrease error rates.
2. Configure the Banner Financial Aid Satisfactory Academic Progress (SAP) module to be in compliance with the UH Hilo Satisfactory Academic Progress Policy. This will include the development of SAP validation and rules, configuration of functionality in Banner, configuration of the Banner self service and email functionalities, and staff training on usage and protocol.
3. Configure the Banner Period-Based Algorithmic Budget module to eliminate the need for manual budget adjustments. Staff training on usage and protocol is required.

**Explanation describing how procurement by standard competitive means is either not practicable or not advantageous to the University:**

Procurement by standard competitive means will not allow DSA to reach target goals outlined below. Evaluating and restructuring the admission process while concurrently addressing technical features in Banner for financial aid distribution is a critical step to scale technology and streamline systems thereby improving student throughput and support. Conforming to the described timeline will allow UH Hilo's admissions and financial aid offices essential time to pilot new processes and implement system changes prior to the Fall 2017 general enrollment deadline of July 1, 2017.

TIMELINE	TASK
December 2016	• Activity 1 (BPA analysis)
February 2017	• Complete Activity 1 (BPA analysis) • Activities 2 & 3 (configuration of Banner SAP and Period-Based Algorithmic modules & concurrent staff training)
April 2017	• Complete Activities 2 & 3 (configuration of Banner SAP and Period-Based Algorithmic modules & concurrent staff

	training)
May 2017	<ul style="list-style-type: none"> <li>• Testing and implementation of results gained from Activities 1, 2 &amp; 3 with available reconfiguration/consultation/training from vendor to remedy any issues that arise</li> <li>• Final completion of all vendor services</li> </ul>

As a reasonable competitive alternative, DSA will extend invitations to consultants who have demonstrated expertise in the aforementioned subject area to provide services herein. The informal procedure should provide DSA, in a timely manner, with proposals from consultants who have the experience necessary to execute tasks listed above.

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

Invitations for proposals will be extended to potential consultants who have been identified as having conducted similar projects requested herein, have an established record of completed and successful projects, and have held university contracts to provide similar services. A team of experienced department personnel consisting of at least three members will comprise a committee to review all timely submitted proposals and evaluate on the quality of the proposal, prior relevant experience, schedule of activities, and proposed cost. The committee, under the leadership of the Vice Chancellor for Student Affairs, will conduct a comparative evaluation of proposals and select a consultant who can best meet the DSA's needs and objectives.

**A description of the Department's internal controls and approval requirements for the exempted procurement:**

The Office of Procurement and Real Property Management will assist in the preparation of a contract for services with the consultant selected. Expenditures will be subject to review, approval, and processing in conformity with the specifications outlined in the contract as well as University expenditure policies and procedures.

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

Gail Makuakane Lundin, Interim Vice Chancellor for Student Affairs, UH Hilo  
 Sherrie Padilla, Enrollment Services Manager and Director of Financial Aid, UH Hilo  
 Zachary Street, Director of Admissions, UH Hilo  
 Xinyan Wang, Administrative and Fiscal Specialist, UH Hilo