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January 13, 2025

TO: Interested Parties

FROM: Alison Roney  
Procurement Agent

SUBJECT: Request for Quotes No. BOT 2025-007, Addendum No. 1  
Performance Appraisal Consulting Services

**ADDENDUM 1 – Questions & Answers**

**1. Will there be an opportunity to discuss scope, deliverables, expectations and process with the BOT for refinement prior to commencing?**

Yes, the Board of Trustees (BOT) is committed to refining the scope, deliverables, expectations, and process in collaboration with the contractor prior to commencement. This ensures alignment and clarity on the project goals, incorporating best practices such as a structured evaluation framework and a holistic approach to assessing leadership and performance.

**2. Is there an existing appraisal performance instrument and process that OHA is currently using, that can be shared for our reference?**

Yes, OHA has an existing performance appraisal instrument and process that will be shared for reference. This will serve as a foundation for developing a more robust and tailored assessment, integrating proven methods for evaluating leadership dimensions, strategy execution, and operational effectiveness.

**3. Do you have a list of constituents who you anticipate will be part of the CEO's appraisal process?**

Yes, OHA will provide a list of constituents who will participate in the appraisal process. These stakeholders will include trustees, department heads, community leaders, and staff members who regularly interact with the CEO. The process will emphasize gathering diverse and candid feedback, ensuring a multifaceted view of performance.

**4. Is there any flexibility with the schedule and deliverable timeline? If for example, a more robust appraisal instrument would require more time to execute, would the BOT be willing to explore this?**

OHA recognizes the value of a comprehensive and credible appraisal process and is open to adjusting timelines if necessary to accommodate a more robust methodology. The priority is to ensure that the process yields actionable insights and supports the CEO's growth and alignment with organizational goals.

**5. Will the BOT be able to prioritize this process in their schedules during the first three weeks of the project?**

Yes, the BOT is prepared to prioritize this process and allocate time during the first three weeks of the project. Trustees understand the importance of their active participation in ensuring the process is thorough and effective.

**6. Is there a detailed Mana i Maui Ola Strategic Plan, which includes specific action items and quantified targets that we can review as part of this process?**

Yes, OHA's Mana i Maui Ola Strategic Plan includes detailed action items and quantified targets, which will be made available for review. This document is critical for aligning the CEO's appraisal with the organization's strategic objectives and assessing progress toward long-term goals.

**7. Please confirm/modify the specific deliverables for this project, as follows: 1. performance appraisal instrument, 2. a performance appraisal process, 3. a written performance appraisal of the current CEO, 4. future performance goals, 5. recommendations for CEO performance improvement, and 6. next steps.**

The BOT confirms these deliverables and welcomes additional suggestions to enhance the process. For instance, integrating anonymous stakeholder feedback and structured observational insights can strengthen the evaluation framework.

**8. Is there a defined budget range for this project?**

OHA does not disclose budget information. Contractors are encouraged to provide a detailed quote based on the outlined scope and deliverables.

**9. Is there anything else you would like to review from us in addition to the quote as part of this submission? For example, scope of work, past client examples, references, etc.**

Yes, OHA would like to review the following in addition to the quote: • Detailed scope of work • Examples of past projects or client engagements • Professional references • Any proposed methodologies or frameworks tailored to this project