

Date of Board Meeting:

October 20, 2026

Recommendation:

Approve 12 months of Ellucian Premium Support Services to provide functional support related to Banner 9 SaaS implementation.

Background and Rationale:

Wharton County Junior College utilizes Ellucian Banner as its enterprise resource planning system supporting critical functions including student services, financial aid, finance, and human resources. Following implementation of the new Banner 9 SaaS environment, WCJC engaged with Ellucian Advisory Services (EAS) to strengthen institutional capacity, provide real-time training for staff, and optimize the College's use of the Banner environment.

Completion of the EAS engagement on November 30, 2026, administration recommends engaging Ellucian Premium Support Services for a 12-month period (January 1, 2027 – December 31, 2027) at a cost of \$144,000 for the year. This need was anticipated as part of the College's ongoing Banner optimization efforts, with funding included in the Fiscal Year 2027 Information Systems budget. The College also anticipates using a portion of its Houston Endowment implementation grant funding to support the initiative, recognizing its alignment with institutional capacity-building and student success efforts. WCJC does not anticipate continuation of Premium Support beyond this 12-month engagement.

Premium Support provides enhanced strategic and functional assistance beyond standard system support. Services include a senior-level Customer Success Manager, named functional consultants for areas such as Finance, Human Resources, Financial Aid, Student, and Student Accounts Receivable, as well as assistance with staff training, business-process improvement, system optimization, technology adoption, and change management. This additional support will help the College improve Banner functionality, strengthen internal expertise, and more effectively address complex functional and operational issues.

The College is a member of the Texas Connection Consortium (TCC). WCJC currently has an Interagency Cooperation Contract with Lamar Institute of Technology (LIT), which serves as the contract administrator under the master agreement between LIT, on behalf of TCC, and Ellucian. The interagency agreement specifically allows WCJC to obtain Ellucian products, maintenance, and professional support services at the rates established under the master agreement.

Budgetary Implications:

\$144,000 (FY27 Current Operating Budget and Houston Endowment Implementation Grant)

Resource Personnel:

Amanda Allen, Ed.D., President

Approval:

President 10/05/20

ATTACHMENT A
STATEMENT OF WORK

Premium Support

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Value Orchestration Services

Customer Success Manager (CSM) - Description of Services

Overview

Ellucian will provide the Client with information technology executive guidance and related strategic leadership through its designated, senior level Customer Success Manager (CSM). The CSM will serve as the primary point of contact for the Client for Ellucian Success Services.

The CSM will provide strategic guidance and operational support to promote optimal utilization of Ellucian services, technologies, and resources. Key areas include:

High-level Tasks and Deliverables for Senior Level Customer Success Manager (CSM)

Engagement	High-Level Tasks	Deliverables
Success & Engagement	Ellucian will: <ul style="list-style-type: none">• Develop and execute service strategies to maximize awareness and effective use of available resources.• Track organizational engagement and provide insights for proactive interventions.• Organize workshops and webinars tailored to organizational success initiatives.	<ul style="list-style-type: none">• Schedule of Review sessions• Success Plan• Weekly progress updates shared via email or scheduled meetings.• Monthly updates delivered to university leadership.

Staff Enablement	<ul style="list-style-type: none"> • Assess and recommend training sessions on Ellucian technology and solution adoption. • Provide best practices for administrative operation, and data-driven success analytics. • Offer coaching sessions for staff to enhance digital literacy. 	<ul style="list-style-type: none"> • Training recommendations and documented best practices.
Institutional Success Planning	<ul style="list-style-type: none"> • Align success strategies with the university's academic goals, retention objectives, and digital transformation roadmap. • Deliver key metrics and success plans to leadership for informed decision-making. 	<ul style="list-style-type: none"> • Monthly institutional business review reports & success metrics highlighting progress, risks, and opportunities.
Adoption & Optimization of Technology	<ul style="list-style-type: none"> • Facilitate seamless adoption and integration of Ellucian platforms and services across departments. • Monitor utilization rates and recommend improvements for system enhancements. • Provide reports on engagement analytics and suggest optimization strategies. 	<ul style="list-style-type: none"> • User adoption & engagement analytics dashboards for stakeholders.
Stakeholder Collaboration & Advocacy	<ul style="list-style-type: none"> • Serve as a liaison between the institution, students, faculty, and Ellucian. 	<ul style="list-style-type: none"> • Annual strategy report detailing

Engagement	High-Level Tasks	Deliverables
	<ul style="list-style-type: none"> • Drive institution-centric initiatives that enhance satisfaction and retention. • Advocate for institutional needs and influence product/service improvements with Ellucian. 	long-term success outcomes.

Service Assumptions

- Ellucian's Senior Level Customer Success Manager (CSM) – Executes success strategies, manages communications, provides reports.
- Ellucian – Supports system integrations, addresses service requests, promotes platform optimization.
- Staff and Faculty engagement is required for optimal service effectiveness.
- Technology integrations and updates may impact implementation timelines.

Client Responsibilities

- Institutional Stakeholders – Engage in planning sessions, provides feedback, ensures participation in success initiatives.
- Client will provide access to relevant platforms, data, and personnel for collaboration.

Out of Scope

- Includes but not limited to any services not described herein.

Success Plan – Description of

Services Ellucian will:

- Assist Client in aligning institutional goals with clear, measurable outcomes.
- Encourage accountability across stakeholders—from kickoff to optimization.
- Build Client strategic playbook, evolving as priorities shift.

Success Review - Description of

Services Ellucian will:

- Encourage Client to bring stakeholders together to evaluate what's working—and what's not.
- Assist Client to turn performance data into insight, and insight into action.
- Support executive confidence through transparent, consistent check-ins.

Planning for Change - Description of

Services Ellucian will:

- Apply industry-leading change management practices.
- Equip Client teams with structured tools and guidance to navigate organizational change.
- Encourage technology adoption supported by the people-side of change—maximizing engagement and long-term success.

Capability Success Consulting

Overview

Ellucian will provide a named Capability Success Consultant (CSC) for each of the designated functional departments (which may include Finance, Human Resources, Financial Aid, Student and Student Accounts Receivable) within Client's Banner or Colleague ERP solution.

The CSC will provide strategic guidance and operational support to promote optimal adoption of Ellucian services, technologies, and resources within each of the designated functional departments.

Key areas include:

High-level Tasks and Deliverables for Capability Success Consulting

Engagement	High-Level Tasks	Deliverables
"Phone a Friend" access	Ellucian will: <ul style="list-style-type: none">• Provide on-demand , during normal business hours, access to named Capability Success Consultants for each designated functional department• Assist in accelerating resolution of complex issues without the wait or escalation.• Support Client functional teams with Higher Education experienced knowledge	<ul style="list-style-type: none">• Contact information and availability of assigned CSCs• Scheduled kickoff meeting with each CSC and Client designated

		function department staff
Department-level Success Planning	<ul style="list-style-type: none"> • Assist Client in developing tailored plans at the functional department level—aligned to strategic institutional goals • Assist Client in bridging high-level objectives with the nuance of day-to-day execution • Collaboratively develop local accountability standards designed to keep Client teams connected to the big picture 	<ul style="list-style-type: none"> • Written department-level success plans • Scheduled plan review and update sessions
Mission- Critical Process Best Practices	<ul style="list-style-type: none"> • Offer guided process reviews that reflect the collective experience of higher ed leaders. • Assist Client in stabilizing operations early, then provide experienced advice and guidance in evolving operations with insight from Client data. • Encourage continuous improvement through the collaborative development of a roadmap of actions to achieve enhanced operational practices 	<ul style="list-style-type: none"> • Access to industry experienced CSCs • Roadmap of discrete actions required to achieve operational best practices
Proactive Stakeholder Coaching	<ul style="list-style-type: none"> • Assign a CSC to each designated departmental and institutional leader to assist in the championing of change with clarity and consistency. • Work with designated department staff to foster alignment across departments and roles, reducing resistance and role confusion. • Document institutional priorities such that they are clearly understood—and acted on—at every level. 	<ul style="list-style-type: none"> • Regular cadenced calls with each CSC • Documented institutional and department level priorities

Product Adoption

Adoption Guidance Overview

Ellucian will provide the Client with Product Adoption Guidance through its CSM and Capability Success Consultants. Specifically, the CSM will provide a planning document that maps a Client adoption plan most likely to meet the Client's organizational priorities.

Ellucian will:

- In collaboration with the Client leadership, deliver a client specific Product Adoption Plan that will outline the timing and priorities of adoption of Ellucian (and related) products
- Encourage technology adoption, guided by the Product Adoption Plan, and supported by the Client staff—maximizing engagement and long-term success.

Success Catalog Overview

Ellucian offers a Pre-Packaged Service Catalog designed to provide clients with a standardized set of advisory and support services, encouraging consistent delivery, transparency, and operational efficiency. These services

are structured to align with industry best practices, offering predefined engagements that optimize resource allocation and accelerate implementation.

Client has contracted an initial quantity of credits as specified in the Order Form. Additional Credits may be purchased in lots of 8 Credits at the customer's convenience. Requests for purchase of additional Credits should be made through the Ellucian CSM.

The Pre-Packaged Service Catalog consists of structured service offerings that are predefined in scope, duration, and delivery method. These services may include, but are not limited to:

- Advisory Support Sessions – Scheduled consulting sessions for strategic

- guidance, available via phone or virtual meeting.
- Health Check Services – Recurring assessments of system performance, compliance, and operational effectiveness.
- Training & Enablement Programs – Standardized training sessions designed to improve user adoption and system proficiency.
- Configuration & Optimization Reviews – Predefined technical assessments focused on system performance tuning and best practice alignment.

Each service package is clearly outlined with specific deliverables, eligibility requirements, and consumption parameters to encourage predictability in service engagement.

Service Delivery Model

- All services within the Pre-Packaged Service Catalog follow a structured delivery framework, promoting consistency across engagements.
- Scheduling and coordination are managed through the assigned CSM.
- Service packages are designed to be consumed within the Services Catalog Term specified in the Order Form to which this SOW is attached and do not roll over to subsequent periods unless otherwise specified.

Client Responsibilities

To enhance execution, clients are responsible for:

- Reviewing available services within the Pre-Packaged Service Catalog and submitting requests to the Ellucian CSM.
- Providing necessary information and access to relevant systems or personnel required for service execution.
- Ensuring timely consumption of scheduled services within the designated timeframe.

Premium Support Offering

Advisory Services Option	Length	Amount
Premium Support	12 - Months	\$144,000
	Total Amount:	\$144,000