Wharton County Junior College

Complete this form and submit it to the Office of the President by 5:00 pm on the eleventh day before the following Tuesday meeting of the Board of Trustees. If this form does not provide enough space, you may use an expanded version *as long as you follow the format specified below.*

Date of Board Meeting: <u>November 15, 2016</u>   Date of This Proposal: <u>November 4, 2016</u>

SUBJECT (item as it will appear on agenda): Approve the transfer of $64,000 from the MIS Plant fund for the purchase of the Ellucian Intelligent Learning Platform.

RECOMMENDATION: Approve the transfer of $64,000 from the MIS Plant fund for the purchase of the Ellucian Intelligent Learning Platform.

BACKGROUND/RATIONALE: The Intelligent Learning Platform (ILP) is Ellucian's integration solution between Banner and Blackboard. The current process is cumbersome and takes manual intervention to complete causing delays in students accessing their online class. The ILP automates the process and adds the below capabilities:

- Automatic Data synchronization for creating course sections, users, enrollments in Blackboard based on Banner data
- Real-time midterm and final grades synchronization from Blackboard to Banner
- Cross-listed sections supported
- Capable of integrating Blackboard data with other applications
- Continued active development and support of solution

Estimated Cost and Budgetary Support (how will this be paid for?): <u>$ 64,000.00 transferred from the MIS Plant fund.</u>

RESOURCE PERSON(S) [name(s) and title(s)]:
Michele Betancourt, Distance Education Director
Pamela J. Youngblood, Vice President of Technology and Institutional Research
Leigh Ann Collins, Vice President of Instruction
Bryce Kocian, Vice President of Administrative Services

SIGNATURES:

_____   _____   11/04/2016_____
Originator   Date

_____
Cabinet-Level Supervisor   Date

PRESIDENT'S APPROVAL:

_____   11-7-16_____

Reg 113
6-21-95, 12-16-99

Wharton County Junior College

Banner to Blackboard Integration

The process to load the information into the Blackboard Learning Management System is an in-house created batch process that is very cumbersome and takes a large amount of manual intervention to complete. Due to being restricted to only batch loading files, the process cannot appropriately handle the schedule change period when students add or drop classes. Due to the large amount of manual intervention, students have encountered delays in gaining access to the Blackboard system on the first days of class. With the current process, final grades have to be manually inputted into the Banner student system by the instructor.

The Intelligent Learning Platform (ILP) is Ellucian's integration solution between Banner and Blackboard. It allows for seamless integration between the Banner student system and the Blackboard learning management system. Below highlights ILP:

- Automatic Data synchronization for creating course sections, users, enrollments, etc. in Blackboard based on Banner data
- Real-time midterm and final grades synchronization from Blackboard to Banner
- Cross-listed sections supported
- Capable of integrating Blackboard data with other applications

Ellucian Price Quotation

Proposed Products

The following prices reflect license fees and first year maintenance costs for the proposed solutions. Ellucian maintenance costs will increase 3% per year. Maintenance is typically prorated and aligned with your current maintenance agreement for Accounting facilitation, so first year Advantage Maintenance Program cost could be different due to a partial year maintenance payment. A prorated Advantage Maintenance Program cost can be calculated once a contract execution date is determined.

Software	License Fee
Intelligent Learning Platform (ILP)	$73,000
TCC Discount	($29,200)
Additional 10% Discount	($7,300)
TOTAL	$36,500

Additional 10% Discount applied only if contract is signed by both Wharton County Community College and the TCC by December 23rd, 2016.

Maintenance

The following prices reflect license fees and first year maintenance costs for the proposed solutions. Ellucian maintenance costs will increase 3% per year. Maintenance is typically prorated and aligned with your current maintenance agreement for Accounting facilitation, so first year Advantage Maintenance Program cost could be different due to a partial year maintenance payment. A prorated Advantage Maintenance Program cost can be calculated once a contract execution date is determined.

Maintenance	First Year Maintenance
Intelligent Learning Platform (ILP)	$7,300

Implementation and Training

Recommended Services	Hourly Rate	Hours	Cost
Intelligent Learning Platform - *remote*	$187	66	$12,342
Project Management	$187	13	$2,431
	TOTAL	79	$14,773

The prices proposed here are valid until November 30, 2016

CONFIDENTIALITY:
This documentation contains confidential, proprietary and/or privileged information of Ellucian and/or its subsidiaries. Unauthorized disclosure or use is prohibited.

Optional Services

Optional Services	Hourly Rate	Hours	Cost
Intelligent Learning Platform Middleware Services	$187	28	$5,236

TAMU-CC Control Number: _____

TCC Member Name:	**WHARTON COUNTY JUNIOR COLLEGE** <<Client>>
Underlying Agreement	This Software Order Form ("Order Form") is issued pursuant to the 2016 Master Software, License, Services and Maintenance Agreement (as thereafter amended) between: The State of Texas, acting by and through **Texas A&M University Corpus Christi** ("TAMU-CC") and the TCC Members; and **Ellucian Company L.P.** ("Ellucian"). All terms and conditions of the 2016 Master Agreement, as amended, are applicable to this Order Form.

PERPETUAL SOFTWARE TABLE:

Client is granted a license to use the Software described in the Software Table below conditioned upon payment of the Total Software License Fee stated in the Software Table.

Software	Source Code Licensed? (yes/no)	Software Supplement	License Fee [1]
Ellucian Intelligent Learning Platform	No	None	$36,500
TOTAL SOFTWARE LICENSE FEE:			**$36,500**

Notes to Perpetual Software Table:

[1]   The pricing contained in this Order Form is valid only if the Execution Date occurs on or before December 30, 2016.

Payment Terms - Perpetual Software License:

The TCC Member will be invoiced by TAMU-CC for the license fee amounts. TCC Member shall pay each invoice to TAMU-CC in accordance to the 2016 Master Agreement.

Ellucian will invoice TAMU-CC for the software license fees. TAMU-CC shall pay each invoice under the 2016 Master Agreement in accordance with Chapter 2251, Texas Government Code.

PROFESSIONAL SERVICES:

Ellucian agrees to provide to Client the additional services identified in the Table(s) below for the additional fees set forth in the Table(s) and on the terms and conditions set forth in the Agreement as modified by this Order Form.

HOURLY SERVICES TABLE: Ellucian will provide Client with the time and materials services identified in the Hourly Services Table below, during the period specified in that Table; for the avoidance of doubt, these are not "fixed fee" or "not to exceed" services, but rather time and materials services for which Client will pay Ellucian for services rendered at the hourly rate provided for in the Hourly Services Table.

Description [1]	Service Amount	Rate (valid for 1 year)[2,3]	Fee [4]
Ellucian Intelligent Learning Platform Implementation Services	66 person-hours	$187 per person-hour	$12,342
Project Management	13 person-hours	$187 per person-hour	$2,431
TOTAL HOURLY SERVICES FEE:			**$14,773**

Notes to Hourly Services Table:

[1]   For a more detailed description of these services, see the Scope of Services attached as Attachment A.

[2]   Hourly rates specified in this table will be held in place for services rendered on this implementation project for a period beginning on the Execution Date and ending one (1) year later. Requests for any additional services beyond the one (1) year period will need to be negotiated under separate Work Order and signed by both parties.

[3]   Client is advised that, without limitation, Ellucian personnel rendering services bill for travel time, preparation time, and follow-up time. Where a number of hours is specified in the table with an associated hourly rate, the "Fee" is a good faith estimate based on the information available to Ellucian at the time of execution of this Agreement. The total amount that Client will pay for these services (i.e., the TOTAL HOURLY SERVICES FEE) will vary based on the actual number of hours of services required to complete the services and the rate that is applicable during that year in which the services are rendered.

[4]   The pricing contained in this Order Form is valid only if the Execution Date occurs on or before December 30, 2016.

Payment Terms – Time and Materials Services: Ellucian will invoice Client monthly for all Professional Services time and materials on an as-incurred basis monthly in arrears, and payments will be due within thirty (30) days from invoice date.

Payment Terms – Expenses and Other Charges: Travel and living expenses are additional. As related to Professional Services, Ellucian will invoice Client monthly for such reimbursable expenses and other applicable charges on an as-incurred basis in arrears, and payments will be due within thirty (30) days from invoice date.

Project Dependencies:
- Client will assign a project leader who will lead the project at the Client's site and be the main point of contact for Ellucian throughout the implementation.
- Client will identify and provide access to the appropriate IT and application staff members to work with Ellucian throughout the implementation process. Client staff will complete preparation activities prior to all service engagements.
- Client will test all delivered functionality/configurations/set-up in a mutually agreed upon timeline.
- Client will document processes, decisions and end user training materials.
- All work associated with this project will be developed for latest releases.
- All services will be provided remotely unless explicitly stated as onsite.
- Client will have all necessary hardware onsite and operational. Client will have all required software installed, other than software to be installed by Ellucian, as specifically scoped herein.
- Client will provide Ellucian with access to appropriate software and functionality in compliance with Client's security and access policies and provide Ellucian access to their servers via a Virtual Private Network (VPN) connection that is supplied by SecureLink. Client will notify Ellucian of any firewall/connection issues that could cause a delay in the delivery of the service.
- Client will ensure that the software release on the Client system is up-to-date and all updates released by Ellucian have been loaded into the appropriate environments as specified. No major upgrades will be introduced into the environment during the course of the implementation except as agreed during project planning activities.

MAINTENANCE:
Contract Year (the Maintenance cycle) begins September 1 and ends August 31.
Client is obtaining Maintenance for the following Software for the fees stated in the Maintenance Table and the notes thereto (below):

MAINTENANCE TABLE:

Ellucian Software @ Advantage Maintenance Level	Base Year Fee
Ellucian Intelligent Learning Platform	$6,570
TOTAL BASE YEAR MAINTENANCE FEE	**$6,570**
If applicable, Ellucian will invoice the appropriate prorated amount below based on the Execution Date:	
PRORATED MAINTENANCE FEE FOR PARTIAL CONTRACT YEAR THROUGH AUGUST 31, 2017 IF THE EXECUTION DATE IS IN NOVEMBER 2016	**$4,928**
PRORATED MAINTENANCE FEE FOR PARTIAL CONTRACT YEAR THROUGH AUGUST 31, 2017 IF THE EXECUTION DATE IS IN DECEMBER 2016	**$4,380**
MAINTENANCE EXPIRATION DATE	08/31/2021

Notes to Maintenance Table:
1   The pricing contained within this Order Form is valid only if the Execution Date occurs on or before December 30, 2016.

Payment Terms – Maintenance:
(a) For the Software described in the Maintenance Table above, Ellucian's obligation to provide Maintenance and Client's obligation to make payment for such Maintenance shall each commence on the first day of the next month following the Execution Date ("Commencement Date") and continue through the Maintenance Expiration Date specified in the Maintenance Table above, inclusive. The Total Base Year Maintenance Fee stated above is the total that would be due from Client for Maintenance fees for the initial full twelve (12) month period; however, Client shall pay a prorated portion of the Total Base Year Maintenance Fee to cover the Maintenance fees due hereunder from the Commencement Date through August 31 2017.

(b) For each subsequent Contract Year through the Expiration Date, Maintenance fees, annual maintenance fee escalations, and maintenance fee due dates will be in accordance with the terms and conditions to the 2016 Master Agreement.

(c) The TCC Member will be invoice by TAMU-CC for the maintenance fees. The TCC Member shall pay each invoice to TAMU-CC in accordance to 2016 Master Agreement. Ellucian will invoice TAMU-CC, the Contract Administrator, for the maintenance fees. TAMU-CC shall pay to Ellucian each invoice in accordance to the terms and conditions of the 2016 Master Agreement.

By the execution of this Order Form, each party represents and warrants that it is bound by the signature of its respective signatory. Except as amended by this non-cancelable Order Form, the terms of the Agreement remain unchanged and in full force and effect; any fees due under this Order Form are in addition to and not in lieu of fees already due or scheduled to come due under the Agreement. In executing this Order Form, Client has not relied on the availability of either any future version of any software, or any future software product.

Ellucian		**TEXAS A&M UNIVERSITY – CORPUS CHRISTI**	
By:		**By:**	
	Authorized Signature		*Authorized Signature*
Name:		**Name:**	
	Printed		*Printed*
Title:		**Title:**	Fiscal Agent for the Texas Connection Consortium
Date:		**Date:**	

The last date of signature above is the "Execution Date" of this Order Form.

CONFIRMATION OF ORDER FORM: By signing below, TCC Member hereby directs Texas A&M University-Corpus Christi to enter this order to Ellucian. TCC Member is responsible for making all payment as requested by Texas A&M University-Corpus Christi in a timely manner in accordance with this Order Form and to otherwise comply with the 2016 Master Agreement and the Interagency Agreement between Texas A&M University-Corpus Christi and TCC Member.

TCC MEMBER

NAME OF INSTITUTION: Wharton County Junior College

For TCC Member Use: Purchase Order Reference Number (if applicable): _____

By:	
	Authorized Signature
Name:	
	Printed
Title:	
Date:	

Intelligent Learning Platform ("ILP") Scope of Services
Service Description

Engagement	Engagement Description	Estimated Ellucian Hours
Technical Planning, kickoff and Turnover (remote)	Technical Planning, kickoff, and Turnover for ILP installation engagements	6
ILP Installation (remote)	• Production and test installation of the Intelligent Learning Platform (ILP) • Configuration and validation of ILP integration to both LMS and ERP • Integration setup and configuration to Ellucian Portal if applicable	24
ILP Consulting (remote)	ILP consulting to learn how to configure and use ILP for Moodle or Blackboard	36
	Required Hours:	66

ILP Service Assumptions

- Authentication Assumptions:

Note: If you do not meet the below assumptions, Single Sign On into Blackboard or Moodle via Ellucian Portal will not function.

- Ellucian Portal and Blackboard or Moodle are using the same unique user identifier (e.g. both are using sAMAccountName or UPN)
- Portal and LMS are both federated through the same federation provider or connected set of providers
- Delivered **Banner** Mappings
    - ILP with Moodle Integration:
        - Banner Form (SSASECT) will map to Moodle idnumber
        - Banner Form (SCACRSE) will map to Moodle fullname
        - Banner Form (GOATPAD) field (Sourced ID) will map to Moodle idnumber
        - Banner Form (GOATPAD) field (Third Party ID) will map to Moodle username
        - Banner Form (SPAIDEN) field (First Name) will map to Moodle firstname
        - Banner Form (SPAIDEN) field (Last Name) will map to Moodle lastname
        - Banner Form (SPAIDEN) field (E-mail) will map to Moodle email
    - ILP with Blackboard Integration:
        - Banner Form (SSASECT) will map to Blackboard "Course Section Sourced ID"
        - Banner Form (SCACRSE) will map to Blackboard "Course Section Title"
        - Banner Form (GOATPAD) field (Sourced ID) will map to Blackboard "Person Sourced ID"
        - Banner Form (GOATPAD) field (Third Party ID) will map to Blackboard "Person Role User ID"
        - Banner Form (SPAIDEN) field (First Name) will map to Blackboard "Person First Name"
        - Banner Form (SPAIDEN) field (Last Name) will map to Blackboard "Person Last Name"
        - Banner Form (SPAIDEN) field (E-mail) will map to Blackboard "Person Email"

- **Banner Requirements are met prior to the ILP Implementation:**
    - Banner Student API App 9.2 or higher
    - Banner General 8.7.3
    - Banner Student 8.7.3
    - Common DB Upgrade 9.1.0.3
    - INTCOMP 8.0.2.6
    - Banner Events Publisher 1.2.3+
    - RabbitMQ 3.3.4+ (Integrated and validated with BEP)

- **Learning Management System (LMS):**
    - Blackboard Learn version 9.1 service pack April 2014 or Higher
    - Moodle 2.7 or Higher

Client Responsibilities:
- All technical and ERP pre-requisite requirements are completed in its entirety prior to the ILP implementation by the client unless otherwise specifically stated.

- Configure hardware as stated in the Ellucian Hardware Recommendations – ILP document
- Provision the Virtual Machines, including Operating System for the deployment of the ILP components
- Provide network administrative support for the configuring of firewalls, load balancer, and network devices as required
- Upgrade the Ellucian software components to the minimum required versions prior to the ILP implementation.
- Provide a properly installed, configured, maintained Microsoft SQL Server for both Production and Test installations of ILP *required for the configuration database*
- Provide a dedicated test environment of an LMS to configure ILP with.

Out of Scope:
- Integration with any Learning Management Provider other than Blackboard or Moodle
- Installation or Configuration of Microsoft SQL Server and SQL Clustering
- ERP updates
- Installation, upgrade or migration of Ellucian Portal
- Configuration of Ellucian Mobile application to connect to ILP
- Installation or configuration of federation of Learning Management System for authentication
- Installation or Configuration of Load Balancers
- Configuration of Network (including DNS or Firewall)
- Language localization

Project Management Scope of Services

Service Overview
Ellucian will provide project management services to Client using Ellucian's Implementation Methodology. Ellucian's implementation methodology is executed in four phases: Initiation Phase, Planning Phase, Execution Phase, and Transition & Close Phase. The four phases of Ellucian's implementation methodology, combined with monitor and control procedures, provide the structure for the overall project, helping the project management team monitor and control expectations, budget, communication, and quality.

Service Description
The following activities, artifacts, and outcomes are considered in scope for project management services:
- Project initiation; Introduction of delivery management team
- Project planning and resource management
- Initial Development of Project Charter or Scope Statement
- Project internal repository for project artifacts
- Ellucian internal project initiation meeting; Client project planning session
- Work with client project management team to manage:
  o Project execution; Project team
  o Communications (status meetings, status reports); Stakeholder expectations
  o Quality assurance activities
  o Issue tracking; Project risk response plans
  o Changes to scope, schedule, resources, and costs
  o Project financials (budgets, project reconciliation)
  o Knowledge resources; Delivery of solution artifacts
  o Delivery to contract and project scope with client acceptance
  o Transition planning; Project closure

Client Responsibilities:
- Client will provide a full-time project leader or functional leader who will work directly with the Ellucian project manager and provide the required input and work product to support project activities, artifacts, and outcomes.
- Client will assign Client resources to complete Client tasks required as part of the project's schedule.
- Client will provide information to Ellucian project team that will contribute to project activities and development of artifacts.
- Client will provide approval on all project activities, artifacts, and outcomes based on the agreed sign-off criteria and client acceptance period for approval.
- Client will attend and participate in project status meetings as defined by the Ellucian project manager and Client project leader.
- Client will provide timely approval of project change requests prior to the start of the project change.
- Client will support and otherwise cooperate with Ellucian throughout all project activities, development of artifacts, and project outcomes.