TEXAS CONNECTION CONSORTIUM

ORDER FORM

LIT Control Number:	
TCC Member Name	Texas Southern University
	("Client" or "the TCC Member")
Underlying Agreement:	This Order Form ("Order Form") is issued pursuant to the 2022 Master Software, License, Services and Maintenance Agreement (the "2022 Master Agreement"), as thereafter amended, between: The State of Texas, acting by and through **Lamar Institute of Technology** ("LIT"), as successor-in-interest to Texas A&M University - Corpus Christi and as an institution of higher education of the State of Texas, for and on behalf of the Texas Connection Consortium ("TCC"); and **Ellucian Company LLC** ("Ellucian"). All terms and conditions of the 2022 Master Agreement are applicable to this Order Form.

This Order Form is made by and between **ELLUCIAN COMPANY LLC** ("Ellucian") and the TCC Member identified above. This Order Form will constitute a separate and independent contract between the parties hereto. Capitalized terms in this Order Form shall have the same meaning given to such terms within the 2022 Master Agreement unless redefined herein.

Licenses granted pursuant to this Order Form (if any) are for Client's internal use only, on Equipment residing within the United States, and are subject to all use restrictions and limitations set forth in the 2022 Master Agreement and this Order Form, including referenced attachments. Ellucian's grant of license(s) to Software may include (as applicable based upon the products identified in the table below) a non-exclusive, non-transferable license to use Software licensed on a perpetual or Term License basis and/or a non-exclusive, non-transferable license to access and use Cloud Software. Ellucian may use a combination of remote services, centralized services, and onsite services, using personnel worldwide, in performing its obligations with respect to Software Support Services, Professional Services and/or Managed Cloud Services identified in this Order Form. Where a number of hours is specified within this Order Form for Ellucian's delivery of Professional Services on a time and materials basis, the associated fees shown herein represent a good faith estimate based on the information available to Ellucian as of the Execution Date; the total fees payable for Professional Services may vary based on the actual number of hours required to complete the services and the rate that is applicable during the period of Ellucian's delivery of the services. Exhibits 1 through 4 are incorporated herein by this reference.

PROFESSIONAL SERVICES PHASE ONE [1,2,3]			
Description	**Quantity**	**Rate**	**Fee**
Ellucian - Application Management Implementation - Advanced Administration	78	$253	$19,734
Ellucian Student Signature - Ethos Services - Advanced Administration	512	$253	$129,536
Ellucian Student - Insights ERP Implementation - Advanced Administration	503	$253	$127,259

Technical Modernization	Fixed Fee	Fixed Fee	$500,000
Banner SaaS Pass [4]	Fixed Fee	Fixed Fee	$16,630
Ellucian Project Management Services	285	$253	$72,105
TOTAL PROFESSIONAL SERVICES FEES:			**$865,264**

Notes for Professional Services Phase One:

[1] Ellucian's acceptance of this Order Form is contingent upon the parties' mutual execution of a separate written TCC Order Form for the Client's transition to Ellucian Student Signature.

[2] For a description of the terms and conditions governing the Professional Services, please refer to the Ellucian Professional Services Terms and Conditions attached hereto as **Exhibit 1**. If the parties have agreed to include a more detailed description of the Professional Services to be performed under this Order Form, it will be set forth in a Statement of Work ("Statement of Work") attached hereto as **Exhibit 2**.

[3] The fees for the fixed fee services identified in the table above covers Ellucian's delivery of such services, as described in the Statement of Work, over a period of up to twelve months (12) beginning January 11, 2027 (the "Delivery Period"). In the event that the fixed fee services are not completed by the end of the Delivery Period, through no fault of Ellucian, additional monthly fees of not more than seven percent (7%) of the total for the fixed fee services package will apply beginning on March 1, 2028 and will continue, on a monthly basis, until such time as Client is in live, production use of the ERP Cloud Software. The total payable for fixed fees will be invoiced monthly as provided below.

[4] With respect to Banner SaaS Pass as identified in the table above, for a period of only two (2) years commencing on the Beginning Date applicable to ERP Cloud Software, Ellucian will provide Client with a set number of seats and access to certain pre-determined public classes as further described in the Ellucian Instructor Led Training ("ILT") product specification sheet attached hereto as **Exhibit 3**.

PROFESSIONAL SERVICES PHASE TWO [1,2,3]			
Description	**Quantity**	**Rate**	**Fee**
Ellucian Student Advanced Administration Signature Modernization	Fixed Fee	Fixed Fee	$1
Ellucian Student - Project Manager - Advanced Administration	750	$253	$189,750
Ellucian Student - Change Management - Advanced Administration	387	$253	$97,911
Ellucian Student - Solution Architect - Advanced Administration	400	$253	$101,200
Ellucian Student - Testing Lead - Advanced Administration	600	$253	$151,800
Ellucian Student - Technical Architect - Advanced Administration	160	$253	$40,480
Ellucian Student - Identity Management Tactical Planning - Advanced Administration	101	$253	$25,553
Ellucian Student - SaaS Reporting Assessment and Strategic Plan - Advanced Administration	170	$253	$43,010
Ellucian Student - SaaS Extensibility Consulting - Advanced Administration	1,156	$253	$292,468
Ellucian Student - Extensibility Development Package - Advanced Administration	672	$253	$170,016
Ellucian Student Signature - Technical Consulting - Advanced Administration	51	$253	$12,903
Ellucian Student Signature - Functional Consulting - Advanced Administration	1,047	$253	$264,891
Ellucian Student Signature- Sprint 0 - Advanced Administration	406	$253	$102,718
Ellucian Student - Ellucian Smart Planning & Integration Implementation - Advanced Administration	275	$253	$69,575
Ellucian Student Signature - Post Go Live - Advanced Administration	237	$253	$59,961
Ellucian - Scholarship Management Implementation	100	$253	$25,300
Ellucian - Net Price Calculator Implementation	39	$253	$9,867
Ellucian - Lead Generation Implementation	16	$253	$4,048
Credential Discovery Implementation	57	$253	$14,421
Productized Integration Implementation	20	$253	$5,060
Evisions Form Fusion Template Development and Consulting	Fixed Fee	Fixed Fee	$6,370
Enterprise Job Schedule - Student	Fixed Fee	Fixed Fee	$4,770
Enterprise Job Schedule - Financial Aid	Fixed Fee	Fixed Fee	$22,790
Enterprise Job Schedule - Accounts Receivable	Fixed Fee	Fixed Fee	$5,300

TOTAL PROFESSIONAL SERVICES FFES	**$1,720,162**

Notes for Professional Services Phase Two :

[1] Ellucian's acceptance of this Order Form is contingent upon the parties' mutual execution of a separate written TCC Order Form for the Client's transition to Ellucian Student Signature.

[2] For a description of the terms and conditions governing the Professional Services, please refer to the Ellucian Professional Services Terms and Conditions attached hereto as **Exhibit 1**. If the parties have agreed to include a more detailed description of the Professional Services to be performed under this Order Form, it will be set forth in **Exhibit 2.**

[3] The fees for the fixed fee services identified in the table above covers Ellucian's delivery of such services, as described in the Statement of Work, over a period of up to eighteen months (18) beginning October 1, 2027 (the "Delivery Period"). In the event that the fixed fee services are not completed by the end of the Delivery Period, through no fault of Ellucian, additional monthly fees of not more than seven percent (7%) of the total for the fixed fee services package will apply beginning on March 1, 2029 and will continue, on a monthly basis, until such time as Client is in live, production use of the ERP Cloud Software. The total payable for fixed fees will be invoiced monthly as provided below.

Invoicing. As applicable based upon the specific products identified in this Order Form, Ellucian will invoice:

- for phase one twelve (12) successive monthly installments for all Professional Services to be performed on a fixed fee basis unless otherwise provided herein, commencing on the 1st day of the next month following January 1, 2027. The initial monthly installment amount shall be $43,058 and each monthly installment thereafter shall be $43,052;
- for phase two one installment in the amount of $39,230 for all Professional Services to be performed on a fixed fee basis unless otherwise provided herein commencing on October 1st, 2027.
- monthly on an as-incurred basis in arrears for all Professional Services to be performed on a time and materials basis as well as for reimbursable travel expenses and other applicable charges in accordance with the terms of the 2022 Master Agreement if Ellucian's performance of Professional Services involves onsite delivery (unless the service rate(s) identified in the Order Form indicates that travel expenses are included).

Payment Terms. The TCC Member shall pay each invoice to Ellucian in accordance with the 2022 Master Agreement. These services specifically exclude any responsibility on the part of Ellucian for providing any services other than those services specifically set forth above. Reimbursable expenses (as provided for in the 2022 Master Agreement) will be invoiced on a monthly, as provided/as incurred basis.

Publicity. From time to time, in the ordinary course of business, Ellucian issues press releases and announcements regarding the completion of transactions with its customers and partners. As partial consideration for the products and services provided by Ellucian, Client agrees to provide Ellucian with reasonable and timely approvals of such press releases and announcements, including (where appropriate), the approval of quotations and acknowledgements to be included in such materials.

By the execution below, each party represents and warrants that it is bound by the signature of its respective signatory for this non-cancelable Order Form. The terms of the 2022 Master Agreement remain unchanged and in full force and effect; in the event of any conflict between the terms of the 2022 Master Agreement and the terms of this Order Form, the terms of the 2022 Master Agreement will take precedence and control. Any fees due under the Order Form are in addition to and not in lieu of fees already due or scheduled to come due under the 2022 Master Agreement. Client has not relied on the availability of either any future version of any software or any future software product or service.

ELLUCIAN	**Texas Southern University**
By:	**By:**
Authorized Signature	*Authorized Signature*
Name:	**Name:**
Printed	*Printed*
Title:	**Title:**
Date:	**Date:**

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

The pricing contained in this Order Form is valid only if the Execution Date occurs on or before December 31, 2026.

Client's Billing Contact Information appears below.

Client Accounts Payable Contact Information:	**Client Cloud Software Provisioning Contact Information:**
Name:	**Name:**
Address:	**Title:**
City, State, Zip:	**Email:**

Email Address:
PO# (if applicable)

ELLUCIAN PROFESSIONAL SERVICES TERMS AND CONDITIONS

Hourly rates specified will be held in place for a period beginning on the Execution Date of an Order Form and ending eighteen (18) months later. Requests for any Professional Services beyond the eighteen (18) month period will be negotiated under a separate order form signed by both parties.

Client is advised that Ellucian personnel rendering services bill for travel time, preparation time, and follow-up time, as applicable.

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 an Order Form. The total amount that Client will pay for services 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.

Fixed Fee services fees will remain valid for a period of one (1) year following the Execution Date of an Order Form; Client must schedule delivery of Fixed Fee services within the one (1) year period or additional charges may apply.

Ellucian may use a combination of remote services, centralized services, and onsite services, using personnel worldwide, in performing its obligations with respect to Professional Services.

Professional Services Assumptions

As applicable, the following assumptions will apply to Professional Services provided under an Order Form that has been executed between Ellucian and a client:

- Client will assign a project leader who will lead the project based on the mutually agreed-upon plan, lead the teams at the Client's site, and be the main point of contact for Ellucian throughout the project defined herein.
- Client will identify and provide access to their appropriate Information Technology and application staff members to work with and assist Ellucian throughout the engagement(s). Client staff will have knowledge of their business area(s), provide relevant documentation, and complete preparation activities prior to all service engagements.
- Services will be provided remotely unless identified as onsite within the Services description documents included in this work order or otherwise determined during project planning call. Onsite engagements will require travel and expenses billed to the Client.
- Client understands and agrees that Ellucian may subcontract with Ellucian-affiliated companies or 3rd parties to perform some or all of the responsibilities described in an Order Form, provided, however, that (1) Ellucian will not be relieved of any duty, responsibility or liability under an Order Form by reason of any such subcontracting , and (2) Ellucian will at all times remain responsible to Client for the performance of its responsibilities under an Order Form.
- Services may include non-Client facing time to support activities such as: preparation, research, and documentation.
- Ellucian travel expenses are paid by the Client per the terms and conditions of the contract.

- Services are delivered on a time and materials basis unless otherwise called out within the pricing documents.
- Training provided by Ellucian follows a 'train-the-trainer' methodology for project teams, will be provided at a single site designated by Client for onsite training, and will limit all training and consulting sessions to no more than 12 participants per session unless otherwise stated in an Order Form or agreed to in advance.
- Client will commit to changing/modifying business processes to conform to Ellucian recommended practices and Ellucian common business process models. Client is responsible for managing staff expectations around Ellucian recommended practices for staff, faculty and students.
- Client will document processes, decisions and end user training materials unless otherwise indicated.
- Except as outlined in the Statement of Work, the development, modification, and/or completion of any rules, reports, integrations/interfaces, subroutines, extensions, and customizations is the responsibility of Client.
- Client participation or shadowing for the installation portion of the engagement, if applicable, is excluded unless specifically defined in the description of Services.
- 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 required by the project. No major upgrades will be introduced into the environment during the course of the implementation except as agreed during project planning activities.
- 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.
- If adding additional Ellucian solutions or modules, all Professional Services to be provided hereunder are based on the implementation of the Baseline version of the Ellucian Software available as of the Execution Date.
- Any tasks, deliverables or services which are not described in this description of Services are out of scope and will not be provided by Ellucian.
- Ellucian's proposed level of effort outlined in the description of Services is based on the information provided as of the Execution Date. Any changes or additions to the scope of the mutually agreed upon Professional Services will be managed through the Ellucian Project Manager and Client's contact through a mutually agreed upon change order process.

Cancellation of Scheduled Professional Services. The parties agree that once Client and Ellucian have scheduled a specific time during which Ellucian will provide Professional Services, Ellucian will be obligated to perform and Client will be obligated to obtain and pay Ellucian for such scheduled Professional Services, in accordance with the agreed upon schedule. If Client desires to cancel or postpone scheduled Professional Services, Client must provide Ellucian with notice of such cancellation or postponement (a "Services Cancellation Notice"). For the purposes of this Section, Services Cancellation Notices must be provided by sending an email to: services@ellucian.com. When cancelling scheduled Professional Services, Client will be subject to the following cancellation fees as liquidated damages and not as penalties:

(a) If Ellucian receives the Services Cancellation Notice more than thirty (30) calendar days prior to the date on which Professional Services are scheduled to commence, Client will not be assessed a services cancellation fee;

(b) If Ellucian receives the Services Cancellation Notice less than thirty-one (31) calendar days, but more than fourteen (14) calendar days, prior to the date on which Professional Services are scheduled to commence, Client will be assessed a services cancellation fee in an amount equal to fifty percent (50%) of the total anticipated fee for the scheduled Professional Services; and

(c) If Ellucian receives the Services Cancellation Notice less than fifteen (15) calendar days prior to the date on which Professional Services are scheduled to commence, Client will be assessed a services cancellation fee in an amount equal to one hundred percent (100%) of the total anticipated fee for the scheduled Professional Services.

In addition to cancellation fees due under this Section, Client will be assessed the full amount of any airline- or hotel-imposed cancellation charges associated with previously purchased non-refundable fares or reservations (as applicable) incurred by Ellucian as a result of the cancellation.

Ellucian

Technical Modernization Statement of Work

Phase 1

Texas Southern University

September 21, 2026

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Phase 1 – Technical Modernization

1 Overview

Technical Modernization is a focused service designed to accelerate adoption of Ellucian SaaS by evaluating and addressing technical barriers that may impede a client's transition to the SaaS platform. The engagement focuses on integrations, reports, customizations, and other institution-specific technical solutions to determine the most appropriate approach for SaaS compatibility.

Technical Modernization is not a full ERP modernization or transformation engagement. This service does not include comprehensive business process redesign, module-by-module functional consulting, extensive organizational change management, or one-for-one replacement of all existing functionality.

The Client acknowledges that adoption of Ellucian SaaS may require acceptance of delivered baseline functionality and standard SaaS processes. Existing customizations, workflows, reports, integrations, and user experiences may not be replicated in the target environment. Where equivalent SaaS functionality is not available, the Client may be required to adopt standard delivered capabilities, utilize approved extensibility options, implement alternative SaaS-safe solutions, perform manual processes, or retire unsupported functionality.

At the completion of the engagement, the client is expected to be operating on Ellucian SaaS with identified technical requirements evaluated and dispositioned in accordance with the remediation categories defined in this Statement of Work.

2 Global Services Assumptions

2.1 General

- The Client may license additional products as part of the overall SaaS solution; however, only the services explicitly identified within this Statement of Work are included in the scope of the Technical Modernization engagement. Additional implementation, configuration, training, or consulting services may be obtained through a separate Statement of Work, change order, and/or services engagement.
- Services and onboarding activity will be provided remotely unless otherwise determined during project planning and/or defined request. The Client is responsible

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for travel expenses according to the contract terms if travel is required for any reason. Expenses are billed to the Client at the time they are incurred.

- Ellucian estimates are based on the assumptions that Client will adopt Ellucian's recommended practices, common business process models and data standards to conform to Ellucian recommended practices and Ellucian common business process models. Client is responsible for managing staff expectations around Ellucian-recommended practices for staff, faculty, and students.
    - If Client does not adopt Ellucian-recommended practices and business processes, the parties will negotiate a change order to determine any adjustments to scope, fees, and timeline. In the case of in-scope modification or extensibility work, recommended business processes may be modified to accommodate SaaS-safe extensions as may be defined and agreed between both parties.
- Ellucian's proposed level of effort for this project is based on the information provided as of the Execution Date. Any changes or additions to the scope will be managed by the Ellucian Project Manager and Client's Project Manager through a mutually agreed upon change order process.
- Any tasks, deliverables or services which are not described in the terms and conditions are out of scope and will not be provided by Ellucian except by mutually agreed upon change order.
- The project timeline will be developed collaboratively between the Client and Ellucian during the Planning and Initiation Phase. The proposed services are based on a 12-month timeline. If the project extends over 12 months, the client may incur additional costs to complete it.
    - The timeline depends upon the availability of key staff and subject matter experts from the Client to participate in onboarding/training/consulting sessions, provide responsive feedback as needed, and meeting deadlines for project work as agreed upon by the Ellucian and the Client.
    - Client acknowledges that the development of custom integrations may impact the implementation timeline and go-live date, and Ellucian shall not be liable for any delays resulting from the enhanced discovery process or development of custom integrations requested by Client.
- Ellucian will assess the Client's current use of Banner in the Managed Cloud environment and, in collaboration with the Client, identify customizations and modifications. Ellucian will provide recommendations for adopting delivered SaaS functionality, SaaS-safe extensibility options, or other supported solutions where applicable.

2.2 Client Responsibilities

- Except as explicitly stated in the Statement of Work (SOW) the Client is responsible for removing or decommissioning local modifications or Banner source-code modifications and for creating any new SaaS-friendly extensions (for example: central workspace cards, workflows, custom integrations, custom reports, etc.).

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- Attend and participate in project status meetings as defined by the Ellucian project manager and Client project leader.
- Identify critical business and IT stakeholders to support assessment, UAT, and roll-out.
- Provide access to required test data and grant Ellucian appropriate remote connectivity and all required access to Ellucian products used (for example, Ethos Integration, Ethos Experience, Banner).
- Procure and configure any additional infrastructure, software, or support services needed to deploy the integration.
- The Client must assign a project manager and adopts a formal internal project management structure in addition to the Ellucian project manager.

3 Platform Installation Assumptions

3.1 Platform Dependencies

- The following core platform components are required and must be entitled and, where noted, configured, and operational prior to applicable services:
  - Ellucian ERP (Banner) - Configured/Operational
  - Ellucian Integration Management (formerly Ethos) including APIs and data models - Configured/Operational
  - Ellucian Low-Code Integrations (formerly Data Connect)
  - Ellucian Central Workspace (formerly Experience) - Configured/Operational
  - Ellucian Business Process Automation (formerly Ellucian Intelligent Processes)
  - Ellucian Reporting and Analytics (formerly Insights) – Configured/Operational
  - Ellucian LMS Connector (formerly Intelligent Learning Platform)
  - Ellucian Application Management (formerly Apply)
  - Ellucian Degree Works - Configured/Operational
- The Client is responsible for ensuring these components are available and fully functional unless explicitly included as part of the service scope.
- If any components from the above list are not available and fully functional, they will require additional scope and timeline and are expected to be implemented prior to the Technical Modernization.

3.2 Environment & Service Readiness

- The Client is responsible for ensuring that all prerequisite systems, components, and environments are installed, configured, and operational prior to the start of applicable services.
- Ellucian and the Client will jointly confirm that all required prerequisites, dependencies, and prior services have been completed and are functioning as intended before commencing subsequent services, including Technical Modernization activities.
- Required prerequisites may include (but are not limited to):

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    - Access to appropriate non-production and production environments
    - Installation and configuration of required Ellucian platforms (e.g., ERP, Ethos Integration, Experience)
    - Completion of prerequisite activities, worksheets, or data preparation
- If prerequisites are not met by agreed-upon deadlines:
    - Services may be delayed or rescheduled
    - The project timeline may be impacted
    - Additional costs may be incurred

3.3 Training Assumptions

- Client functional teams are not novice users of Banner and are competent, so no basic training is required.
- The Client is responsible for end-user training and Client-specific documentation.
    - Ellucian uses a "train-the-trainer" methodology to train the administrative and power users participating in the engagements. The expectation is that they will train the remaining staff.
    - Training materials are available to the client from the Customer Center.
- Training will be provided using a combination of modalities:
    - On-Demand Training (ODT) – Very high-level recordings that provide an overview of product functionality. These are useful to the Client as they are preparing for consulting sessions, as they help the user gain a basic understanding of the topic. This training is optional.
    - SaaS Pass, a package Instructor-Led Training (ILT) sessions required for modernization activities, is included in the contract. These sessions provide a greater level of detail on product functionality and configuration. They are conducted live by subject matter experts and held on a regular schedule. While not institution-specific, the training is valuable for gaining a deeper knowledge of configuring and managing Ellucian products. ILT courses are considered prerequisites for some consultant-led engagements. This will be specified in the engagement agenda well in advance so that the user can register for upcoming sessions.
    - Consultative Training – Nearly all Ellucian services include some element of training for products being deployed or newly introduced functionality during the course of an engagement. Training may be conducted during discovery to show the art of the possible, as part of a configuration engagement, during User Acceptance Testing (UAT), or as a specific training session. These sessions are consultant-led using the train-the-trainer method described above and are specific for each client.

3.4 Testing Assumptions

- For deployed products/functionality:
    - Ellucian will create test plans and facilitate testing sessions while it is the Client's responsibility to perform User Acceptance Testing (UAT) after each deployment into

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a non-production and a production environment. Activities include conducting a planning session for testing, documenting testing scenarios and expected outcomes collaboratively, guiding the Client through testing, documenting results, and troubleshooting activities during the testing cycle. Ellucian will document a summary of the results.
    - As the project is nearing a key module go-live, an end-to-end test strategy will be jointly defined and executed based on the Customer Architecture Reference Model (CARM). It is a walk-through of the ERP baseline capabilities and is meant to confirm user acceptance of the fully configured capability, including interfaces, integrations, and other required extensibility.
- For Data Migration/Conversion:
    - Ellucian will lead the Client through data validation after each round of data conversion in a non-production or a production environment. Activities include conducting a planning session for data validation, providing training on reviewing expected results and the process for validation, providing a template to use for recoding testing activity, guiding the Client through the testing exercise, monitoring documentation of results, and troubleshooting activities during the testing cycle.

4 Remediation Scope and Content Categories

Based on information provided by the Client, including assessments, surveys, discovery activities, inventories, and other documentation completed prior to execution of this Agreement, Ellucian has identified a preliminary inventory of integrations, customizations, and reports that may require remediation to support SaaS adoption. This preliminary inventory is documented in Appendix A.

Inclusion of an item in Appendix A does not imply that the item will be recreated in its current form. During the Technical Modernization discovery phase, remediation recommendations will include one or more of the following: adoption of delivered SaaS functionality, use of productized solutions, implementation of SaaS-safe extensibility, redesign of the capability, or retirement of functionality that is not supported in the target SaaS architecture.

The items identified in Appendix A may include one or both of the following categories:

- **Integrations -** Include interfaces, data exchanges, APIs, file transfers, and other connections between Banner and third-party applications or services. For integrations included in scope, the Client will provide current-state documentation, mappings, interface specifications, and business requirements necessary to support assessment, remediation, and validation activities. The Client is responsible for participating in requirements reviews, testing, and acceptance activities.
- **Customizations** - Include modifications to delivered functionality, locally developed solutions, extensions, workflows, and other institution-specific capabilities that may require evaluation for SaaS compatibility. For customizations included in scope, the Client will provide documentation and business requirements describing the current

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functionality and intended business outcome. The Client is responsible for reviewing proposed remediation approaches and participating in testing and acceptance activities.

- **Reports –** Only the reports identified in Appendix A will be considered within the scope of the engagement. Where reporting requirements are identified during assessment activities and included in the contracted scope, the Client will provide report definitions, business requirements, sample outputs, and any necessary third-party reporting platform information. The Client is responsible for validation testing and acceptance of delivered reporting solutions. Any reports that are not clearly identified in Appendix A will be solely the responsibility of the client to develop.

Following execution of this Agreement, Ellucian will conduct additional discovery activities to validate assumptions, confirm requirements, and finalize remediation approaches for the items identified in Appendix A. If additional use cases, requirements, business processes, dependencies, or complexity are identified which materially differ from the information available during the initial assessment, adjustments to scope, timeline, or fees will be addressed through the mutually agreed upon change order process.

5 Platform Installation

5.1 Ellucian Integration Essentials

Overview

Ellucian will integrate Ethos with the Ellucian ERP.

High-level Tasks and Deliverables for Ellucian Integration Essentials

Engagement	High Level Tasks	Deliverables
Planning and Turnover	Ellucian will: • Facilitate technical kickoff; • Conduct service preparation call; • Validate pre-requisites for service readiness; and • Facilitate knowledge transfer on Ethos integration and Ellucian ERP Middleware component deployment.	• Service Preparation Document • Training Materials
Ethos Integration – Functional Integration	Ellucian will: • Configure the Ellucian ERP in preparation for the Ethos Integration implementation; and • Configure Ellucian Ethos Data Model mappings in both non-production and production.	• Decision Workbook • Configured Mappings

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Engagement	High Level Tasks	Deliverables
Ethos Integration - Technical Integration	Ellucian will: • Deploy or upgrade the Ellucian Messaging Adapter to the latest supported version; • Configure the Ellucian ERP for the integration required for the Ethos Integration implementation; and • Configure the Client Ethos Integration Tenant to the authoritative source (Ellucian ERP) in non-production and production.	• Deployed or Upgraded Ellucian Messaging Adapater • Configured Ellucian ERP for Ethos Integration
Ethos Integration – Technical Validation	Ellucian will: • Perform Ethos integration message flow validation from Ethos integration to the Ellucian ERP; and • Perform Ellucian ERP to Ethos integration in non-production and production.	• Validate non-production and production environments • Installation Report

Client Responsibilities

- Develop and deliver test plan;
- Provide test data in the designated non-production environment per the test plan;
- Provide access to ellucian.okta.com with Ethos Integration icon with data access if Client has Ellucian Analytics or Workflow;
- Client must meet the requirements for Ellucian Ethos Integration;
- Order an SSL certificate from a well-known certificate authority for both non-production and production;
- Upgrading and validating that all Banner pre-requisites for both the Banner Common DB Upgrade and the Ethos API DB upgrade are met;
- Applying all the ODS pre-processor steps and ensuring ODS is properly staged if applicable;
- Install and/or upgrade the Banner Student API and Ethos Integration API unless specified within scope;
- Install and validate that the Banner DB Upgrade and Ethos DB Upgrade are installed in the Banner environments of which the API's will be integrated with unless specified within scope. The installation must be complete for all licensed Banner modules; and
- For On Premise Clients Only:
  - Provide a designated non-production environment representative of the intended production environment for deployment of the integration;
  - Provide the appropriate resource(s) to assist with deployment of integration components and execute the test plan in the same designated non-production environment, and provide timely system support as needed to maintain operation and availability of the designated non-production environment;
  - Order, install and configure an SSL certificate in both 1 non-production and 1 production environment unless specified within scope;

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- Run the GUID generation process via the GJAPCTL screen in Banner INB or Banner 9 Admin Pages;
- Install the webserver (Tomcat or WebLogic) with an SSL certificated from a well-known certificate authority unless specified within scope for the API's to be hosted on.

Ellucian Ethos Integration Requirements (Banner On Premise Only)

- Banner Student API;
- Banner Integration API;
- Banner Common Database Upgrade;
- Banner Ethos API DB Upgrade;
- SSL configuration (needs to support TLS 1.2) with a certificate from a well-known certificate authority for the Banner Student API;
- SSL configuration (needs to support TLS 1.2) with a certificate from a well-known certificate authority for the Banner Integration API;
- Ellucian Messaging Service; and
- Banner Events Publisher.

5.2 Ellucian Central Workspace Platform Setup and Configuration

Overview

This service provides setup and configuration for the out-of-the-box Central Workspace Platform capability suite using your current Ellucian ERP environment as the foundation.

High-level Tasks and Deliverables for Ellucian Central Workspace Platform Setup and Configuration

Engagement	High-Level Tasks	Deliverables

Ellucian Central Workspace Platform Setup and Configuration	Ellucian will:
	• Provide consulting to configure single sign-on with the Client's single sign-on provider which includes:
	  ○ Validate Ethos integration and functional mappings in 1 non-production and 1 production environment;
	  ○ Configure SAML SSO (via ADFS, Shibboleth or Ethos Identity);
	  ○ Gather details on which SAML assertions will define the roles to be used in Ellucian Central Workspace;
		• Validation report
		• Single sign-on configured
		• Confirmation of successful Central Workspace sign-in
		• Configuration worksheet
		• 1 provisioned non-production Ellucian Central Workspace site
		• 1 provisioned production Ellucian

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Engagement	High-Level Tasks	Deliverables
	○ Set up Ellucian Central Workspace application in Ethos integration; ○ Configure delivered content connectivity; ○ Support required data access loads and troubleshooting; and ○ Adjust permissions as required.	Central Workspace site

Service Assumptions

- Prior to engagement, Ellucian will verify with the Client that the necessary components for the functionality to be discussed are installed and functioning and verify that the Client participants have access to the proper elements of the Client non-production environment.

Client Responsibilities

- Work with Ellucian to determine service expectations and timeline;
- Circulate Ellucian materials in advance of the service;
- Complete engagement prerequisites by the deadlines provided;
  - Prerequisites may include extracting and delivering data from your system, verifying, and updating the Ellucian software components to the minimum required versions in a non-production environment, or ensuring access to all participants;
  - Engagements will be postponed and the project will be at risk if all pre-work is not completed by the deadlines provided;
  - Delays may result in additional costs;
- Configure identity provider for single sign-on (SSO) prior to engagement;
- Perform ongoing content changes and updates;
- Develop custom cards, pages and integrations;
- Provide required access to the Ethos Integration and Ellucian Central Workspace components;
- Provide current state identity environment documentation; and
- Provide input on desired state or goals of identity environment.

Out of Scope

- Configuring SSO with a provider besides ADFS, Shibboleth or Ethos Identity;
- Configuration or setup of additional integrated licensed products;
- Data access loading or troubleshooting;
- Shared Technology Platform (STP);
- Customizations which may be required to provide parity with current portal-like systems;
- Performing content management and intranet functions including document storage and collaboration; and

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- Performing content migration from existing portal system to Ellucian Central Workspace.

5.3 Ethos Data Connect Workshop

Overview

Ellucian will conduct a hands-on workshop showcasing Ethos Extensibility-based integrations using Ethos Data Connect. This workshop builds on training provided during the Ellucian Education Center Data Connect Integrations Fundamentals for Developers course. It will examine Ethos Data Connect and common integration use cases to enable the Client to develop Ethos-based integrations.

High-level Tasks and Deliverables for Ethos Data Connect Workshop

Engagement	High-Level Tasks	Deliverables
Kick-off and Service Preparation	Ellucian will: • Conduct a project initiation meeting and prepare for the workshop; • Verify necessary components for Ethos Integration are installed and functioning; • Verify the participants in the workshop have access to a non-production environment; and • Review and identify use cases that will leverage Ethos Integration.	• Workshop Agenda • Service Preparation Document

Ethos Extensibility Integration with Data Connect Workshop	Ellucian will:
	• Conduct project initiation meeting and preparation for workshop;
	• Provide an overview of Ethos Integration;
	• Review and identify use cases that will leverage Ethos Integration methodologies;
	• Ellucian will educate the Client on the following topics:
	  ○ Overview of the Data Connect Designer;
	  ○ Overview of the Data Connect fittings;
	  ○ Discuss the Data Connect Developer workflow;
	  ○ Overview of Data Connect Crosswalks;
	  ○ Overview of common design approaches for data ingestion and
		• Training material
		• Packaged demonstration code

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Engagement	High-Level Tasks	Deliverables
	extraction using Ethos Integration and Data Connect; ○ Hands-on exercises demonstrating Data Connect development techniques using common fittings: ▪ File Writer Fitting; ▪ File Reader Fitting; ▪ GraphQL Fitting queries for Ethos Data Access; ▪ Ethos API Fitting for HTTP GET operations; ▪ Ethos API Fitting for HTTP POST and PUT operations; ▪ JavaScript Transform Fitting; ○ Overview of Ethos Data Connect Serverless APIs and design patterns; ○ Overview of error logging techniques in Data Connect; • Educate the Client on methods to discover appropriate Ethos and other available API usage for the identified use case; • Conduct hands-on tests with an API platform tool to validate APIs are functioning as designed; • Walk through common error scenarios, logging, and handling with Ethos Data Connect; and • Recommend API integration development common patterns.	

Service Assumptions for Ethos Data Connect Workshop:

- No production-ready code is expected to be delivered as part of this workshop;
- Only baseline Ethos Data Models will be demonstrated as part of the hands-on workshop examples;
- This working session will be conducted in non-production ERP and Ethos integration component instances;
- The primary focus of the workshop is to build SaaS compliant Ethos integrations:
  - Depending on the use case, an Ellucian consultant may need to introduce other Ellucian products for completeness (e.g., Ethos Data Access, Ellucian Experience, etc.);

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    - Ethos Schema Extensibility mechanisms, such as Ethos Extend, Specification-based APIs, and Custom Tables, will not be covered in-depth;
    - Training on additional Ellucian products is not a part of this work effort and can be arranged via a separate work order, if needed;
- Prior to the engagement, end-to-end, bidirectional communication between the ERP and Ethos integration is set up, configured, and fully functional;
    - Ellucian can provide services to set up Ethos integration and its associated components via a separate work order;
- Ellucian will engage the Client to discuss reducing the scope of the selected use cases, if needed;
- Workshop participants should have a basic understanding of JavaScript and GraphQL;
- Database cloning or upgrades are not planned between the completion of the Service Preparation phase and during the workshop delivery schedule;
- This workshop is limited to 15 participants per workshop;
- For MEP/STP institutions:
    - The workshop will leverage data/configurations from 1 school. This data will be shared and visible to all the participants in the workshop. During the Service Preparation call, the Client point-of-contacts and the Ellucian consultant will determine the non-production environment of the school that will be used for the workshop;
    - In the context of the hands-on workshop examples, requirements around data/configuration evaluation or comparison across multiple schools will be assessed. The Ellucian consultant will propose additional services via a Change Request or a separate work order to address the Client's requirements;
- The development of custom cards, pages, and integrations is the responsibility of the Client staff; and
- Ellucian may develop custom cards, pages, and integrations for the Client via a separate work order.

Client Responsibilities for Ethos Data Connect Workshop:

- Ensure that Ethos APIs and Ellucian Experience have been installed, configured, and are returning successful, relevant responses;
- Work with Ellucian to determine service expectations and timeline;
- Circulate Ellucian materials in advance of the service;
- Complete engagement prerequisites by the deadlines provided;
- Delays may result in additional costs;
- Prerequisites may include extracting and delivering data from your system, verifying, and updating the Ellucian software components to the minimum required versions in a non-production environment, or ensuring access to all participants;
- Engagements will be postponed, and the project will be at risk if all pre-work is not completed by the deadlines provided;
- Provide a designated non-production environment representative of the intended production environment for deployment of the integration;

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- Provide test data in the designated non-production environment per the test plan;
- Provide access to Ellucian Ethos Integration environments for your institution's administration interface, integrate.elluciancloud.com, to configure and monitor integration applications, including resource management, data subscriptions, and API connectivity through both proxy and GraphQL requests;

Out of Scope for Ethos Data Connect Workshop:

- Includes but is not limited to any services not described herein.
- Activities related to ERP specific technology stack, for e.g., Colleague Envision, Colleague Self Service, Banner PL/SQL, Banner Self Service, or Admin pages)

5.4 Ellucian Reporting and Analytics Premium Implementation

Overview

This service provides consultative support for configuration and training on Ellucian Reporting and Analytics. It is meant to aid attendees in the development of skills pertinent to their roles and responsibilities related to management of Ellucian Reporting and Analytics.

High-level Tasks and Deliverables for Ellucian Reporting and Analytics Premium Implementation

Engagement	High-Level Tasks	Deliverables
Ellucian Reporting and Analytics Premium Implementation	Ellucian will: • Provide training to introduce the features and capabilities of Reporting and Analytics Reporting Tool; • Configure Ellucian Reporting and Analytics administrative functions; • Review delivered content within the Reporting and Analytics platform; • Support Client during initial data loads into the Reporting and Analytics data warehouse and briefly review the delivered content; and • Assist with creating a test plan for 1 external reporting tool to Ellucian Reporting and Analytics, if applicable.	• Ellucian Reporting and Analytics configured in 1 non-production environment • Ellucian Reporting and Analytics configured in 1 production environment • Training materials • Summary of configuration and administration • Connectivity validation for up to 2 Ellucian supported source systems • Confirmation of data load for up to 2

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Engagement	High-Level Tasks	Deliverables
		supported Ellucian source systems

Service Assumptions

- Prior to engagement:
  - Ellucian will verify with the Client that the necessary components for the functionality to be discussed are installed and functioning.
  - Ellucian Experience is operational for 1 environment;
- Client participants have required access;
- Engagements will be postponed, and the project will be at risk if all pre-work is not completed by the deadlines provided;
- Delays may result in additional costs;
- Supported Ellucian source systems include Banner, Colleague, or Degree Works; and
- Data sources identified will be implemented concurrently.

Client Responsibilities

- Work with Ellucian to determine service expectations and timeline;
- Provide participants with Ellucian materials in advance of the service delivery;
- Complete Reporting and Analytics Readiness Worksheet before the services are scheduled;
- Provide current state identity environment documentation; and
- Provide input on desired state or goals of identity environment.

Out of Scope

Includes but is not limited to:

- Configuration and training on the Client reporting tool;
- Extending data models or custom transformations;
- Report development;
- Data lineage and data definitions;
- Training on the setup of roles, permissions, and SSO;
- Provisioning of Reporting and Analytics environment;
- Non-Ellucian data sources;
- Data model training; and
- Advanced training in the Reporting and Analytics Reporting Tool.

5.5 Ellucian Business Process Automation Business Process Consulting

Overview

Ellucian will deliver a hands-on Workshop to help the Client understand how to configure and use the Ellucian Business Process Automation product. All hands-on activities performed during the Workshop are conducted in the Client's test environment, and any updates made to the test environment will be available after the Workshop ends.

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Ellucian will also deliver sessions to gather workflow requirements (up to 8 business processes) and assist the Client in determining the best solution for building their processes.

High-level Tasks and Deliverables for Ellucian Business Process Automation Business Process Consulting

Engagement	High-Level Tasks	Deliverables
Planning and Configuration	Ellucian will: • Conduct project initiation meeting, Workshop service preparation, and preparation for Workshop; • Verify that necessary components for Ethos Integration and EIP are installed and functioning; • Help Client configure EIP if needed; and • Verify that the Client team participating in the Workshop will have access to their non-production environment.	• Workshop Agenda • Service Preparation Document (SPD)
Workshop	Ellucian will: • Support understanding of the Ellucian EIP architecture and platform; • Provide guidance on how to obtain reference information for Ellucian Experience; • Verify that the components necessary for Ellucian EIP are installed and functioning properly; • Provide recommended practices for Ellucian EIP development; and • Guide Client through hands-on exercises.	• Training material • EIP Workflow Examples
Process Discovery	Ellucian will: • Assist Client with reviewing current business processes; • Assist Client in prioritizing automated workflows that they wish to develop using Business Process Automation; • Determine what Ethos Data Models, Data Model extensions, Business Process APIs, or specification-based APIs are needed; and • Determine what Business Process Automation components are needed.	• Specification Template

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Service Assumptions

- This workshop is delivered remotely;
- This workshop is limited to a maximum of 10 participants per workshop;
- The workshop will leverage data/configurations from 1 environment. This data will be shared and visible to all the participants in the workshop. During the Service Preparation call, the Client POC's and Ellucian consultant will determine the non-production environment of the school that will be used for the workshop;
- The development of custom EIP workflows for the Client is the responsibility of the Client technical staff. Ellucian can develop custom EIP workflows for the Client via a separate work order;
- Ellucian Ethos Integration must be configured, and data availability confirmed;
- All Ellucian recommendations will be limited to the capabilities of the EIP product at the time-of-service delivery;
- The workshop is expected to be a working session on non-production ERP and Ethos Integration and Ellucian Experience component instances;
- The workshop will use a previously-agreed-upon selection of Ethos Data Models for the workshop; and
- Ellucian Experience must be installed and fully configured.

Client Responsibilities

- Client should be trained in Ethos and Ethos Data Connect;
- Client responsible for building and deploying processes to production; and
- Ensure any data clean up (delete API keys, tokens, shared credentials, extensions etc.) activities are completed after the service delivery.

Out of Scope

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

6 Technical Modernization Package

Overview

This Technical Modernization Package provides support and content development that enables a transition to the Ellucian SaaS Platform with emphasis on removing traditional blockers, including integrations, reporting, and custom extensions, enabling upgrade to SaaS, focusing on the following:

- **Technical Governance & Planning** – Provides project governance, technical assessment review, remediation planning, and project management to establish the foundation for the engagement.
- **SaaS Foundation & Readiness** – Provides assessments, architecture reviews, environment preparation, and planning activities to support adoption of Ellucian SaaS platform capabilities, baseline functionality, and supporting technologies.
- **Technical Remediation & Alignment** – Evaluates integrations, reports, customizations, and other technical solutions to determine appropriate SaaS-compatible remediation

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approaches. Activities may include adoption of delivered functionality, implementation of SaaS-safe solutions, use of approved extensibility capabilities, technical rationalization, and alignment with Ellucian-supported architecture.

- **SaaS Transition & Validation** – Supports migration, testing, validation, and deployment activities required to transition the institution to the SaaS environment.
- **Content Implementation & Deployment** – Implements and deploys approved (based on Tech Mod discovery outcomes) integrations, reports, Experience content, and other defined technical deliverables defined within Appendix A are included within the scope of the engagement.

High-level Tasks and Deliverables for Technical Modernization Package

Engagement	High-Level Tasks	Deliverables
Discovery & Design	Analysis of Current state and architecture of future state	• Delta from current to future state provided in form of solutioning sheet • Customer decision map of SaaS-compatible remediation items and key decision points
Project planning, and project kick off	Ellucian will: • Schedule and facilitate a kickoff call with Client to plan for the technical and organizational activities required for the Technical Modernization	• Project Plan
Test / Production SaaS Environment	Ellucian will: • Provision an Ellucian Student powered by Banner site that will be primary content development & testing environment. • Provisioning an Ellucian Student powered by Banner production environment. • Data conversion of existing Banner data & processes into SaaS configuration • Initialize Ellucian Student pre-built content into SaaS configuration, including dashboards, reports, template-based integrations,	• Client configured Ellucian Student powered by Banner.

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Engagement	High-Level Tasks	Deliverables
	experience cards, process flows, and role definitions.	
SaaS Extensibility Workshop	Ellucian will: • Based on findings from assessments, identify capability areas for further review; • Conduct SaaS Extensibility sessions to review existing business needs and current integrations, reports, and customizations, • Develop SaaS compatibility recommendations through review of scans, discovery surveys, and client input • Provide brief narrative on reasoning for each suggested optimization and its value proposition • Recommend prioritized opportunities for development	• Solutioning sheet catalog/backlog of expected non-baseline build work • Report on recommendations
Identity Tactical Planning	Ellucian will: • Educate the Client on Ellucian identity features, processes, and tools; • Understand the current state of client identity • Develop the project plan to incorporate Ellucian applications into the Client's overall identity architecture.	• Future state architecture with Ellucian applications incorporated
ILP Consulting	Ellucian will: • Conduct a functional overview of ILP and its features; • Connect ILP to Ethos Integration; • Connect ILP to 1 non-prod and 1 production supported Learning Management System;	• Reference guide • Decision workbook • ILP connected and tested in production environment

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Engagement	High-Level Tasks	Deliverables
	• Configure and test bulk and real-time provisioning course, user, and enrollment updates against 1 non-production and 1 production environment; • Configure and test Grade sync setup against 1 non-production and 1 production environment; • Set up integration with Ellucian Experience; and • Assist with ILP go-live planning.	
Ellucian Apply Implementation Service	Ellucian will: • Facilitate an Apply Kick-Off Call • Demo the product • Review project timeline, persona development and roles, scope components, and technical prerequisites. • Conduct a check and verification call of technical prerequisites • Confirm that all Ethos and Experience configurations are complete • Configure and verify the Apply Application in Ethos • Review requirements and provide basic troubleshooting and support for outstanding prerequisites. • Facilitate the training of Application Designer(s) and Admissions Operations Staff for the design and configuration of apply forms and settings • Configure 1 inquiry form and 1 application	• Task log update • Recording • Technical Requirements Documentation • Personas/Staff identified • Apply Ethos Application Configured • Technical Signoff Document • Complete 1 inquiry and 1 application form

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Engagement	High-Level Tasks	Deliverables
	• Configure notifications for 1 inquiry and 1 application. • Provide training to enable the Client to understand the flow of information and integration for Apply and procedures for processing applications.	
Integration Content Build	Ellucian will: • Configure Integration components to facilitate content build based on assessment surveys. • Conduct Integration definition calls; • Undertake a use-case-based discussion for the integrations built by the Ellucian Product team; • Validate pre-requisites for service readiness; • Facilitate knowledge transfer on integration and Ellucian ERP Middleware component deployment; • Configure the Ellucian ERP in preparation for the integration implementation and content build; • Configure the Client Ethos integration tenant to the authoritative source (Ellucian ERP) in non-production and production; • Perform Ethos integration message flow validation from Ethos integration to the Ellucian ERP; • Perform Ellucian ERP to Ethos integration in non-production and production; and • Update Ethos configurations to migrate Ethos applications to Ellucian Banner SaaS. • Build templated based integrations as defined in Assessment Survey	• Configured Ellucian ERP for Ethos integration. • Validated operational integrations in 1 non-production and 1 production environment • Template based SaaS compliant integrations as defined in Assessment Survey • Product-delivered Service Artifacts for the integrations

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Engagement	High-Level Tasks	Deliverables
Reporting Content Build and Deployment Implementation	Ellucian will: • Configure reporting components to facilitate content build based on assessment surveys. • Conduct report definition calls; • Undertake a use-case-based discussion for the reports built by the Ellucian Product team; • Validate pre-requisites for service readiness; • Configure the Ellucian ERP in preparation for report content build and deployment; • Build templated based reports as defined in Assessment Survey	• 1 configured non-prod environment • 1 configured production environment • Validated operational reports in 1 non-production and 1 production environment • Template based SaaS compliant reports as defined in Assessment • Product-delivered Service Artifacts for the reports

Delivery phase for Partner Developed Integrations	Ellucian will:
	• Support technical setup:
	  ○ Assist in the configuration of the Client Ethos Integration Tenant and provide Ethos Connected Partner with the APIKEY;
	  ○ Support APIUSER setup;
	• Support functional setup:
	  ○ Support Ethos Connected Partner and Client with the functional data mappings and rules;
	  ○ Support testing and business function related questions;
	• Support deployment:
	• Confirm Ethos Integration message flow from Ethos Integration to Ethos Connected Partner and from Ethos Connected Partner to Ethos Integration.
		• Validate operational integration in 1 non-production and 1 production environment
		• Integration Report

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Engagement	High-Level Tasks	Deliverables
Central Workspace Card and EIP delivery using SaaS Extensibility Tooling	Ellucian will: • Conduct an assessment to understand and document the requirements for the Central Workspace card and EIP design and development; • Document the scope of the requirements and use cases for Central Workspace card and EIP design and development; • Design and deliver the Central Workspace cards and EIPs in one non-production and one production environment; • Conduct internal testing on the delivered Central Workspace cards and EIPs; • Support the Client during their quality assurance phase to verify that the content is working as expected; and • Develop an installation and configuration guide to facilitate the Client administration/maintenance activities as Central Workspace administrator.	• Assessment report(s) • Test plan(s) • Central Workspace Card administration guide(s)
Transition and Go-Live Support	Ellucian will: • Provide go-live support if required.	• Go Live report
Project Management	Ellucian will: • Set up a Project Site; • Introduce the project leadership team; • Create an integrated project schedule; • Familiarize the Client with the Project Site; • Conduct project planning meetings; • Create Project Site project scope; • Create project budget baseline;	• Project Site for project collaboration • Integrated Project Schedule • Project Schedule for Project Site • Project budget reconciliation for Project Site • Project site risk, issues, and decision registers

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Engagement	High-Level Tasks	Deliverables
	• Document initial risks, issues, and decisions on the project site; • Conduct regular project status update meetings; • Conduct periodic project quality reviews; • Manage project tasks; • Manage risks, issues, and decisions; • Manage scope; • Conduct assessment review meeting to review overall findings; • Create a project success story; and • Complete the client survey for project completion.	• Updates to Project Site status, schedule, risk, issues, and decision registers • Meeting summaries • Project Success Story • Client Survey

6.1 Service Assumptions

6.1.1 Overall

- Prior to engagement, Ellucian will verify with the Client that the required components for the planned functionality are installed and functioning, and that Client participants have access to the appropriate elements of the Client's non-production environment.
- Data migration will be performed in three iterations (two to non-production for testing, then one to production). The Client is responsible for data migration activities.
- The Client agrees to accept updated configurations (rules and validations) across Banner modules as needed and to fully test processes to maximize system efficiency.

6.1.2 Ethos User Provisioning (EUP)

Assumptions / Ellucian responsibilities

- Default password format is random. The Client must provide a user password-reset tool that allows end users to reset passwords without knowing the initial value.
- Ellucian will verify that Ethos integration is installed and tested in non-production and production environments (mappings from SIS to Ethos integration data models; Banner Ethos API 9.27 or higher).
- If prerequisites (delivered during initial engagement) are not complete by the service-readiness step, deployment services must be rescheduled.
- All user objects will be created in the same directory location (for example, OU for Active Directory).

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- Bulk loading of provisioning messages is available only when the provisioning target is an on-premise LDAP or AD.

Client prerequisites / responsibilities

- Provide end-to-end third-party identity knowledge as required for Okta/Azure or other vendors for an end-to-end implementation (this service configures the EUP tool; third-party vendor setup/knowledge is the Client's responsibility).
- Enable Microsoft O365 (non-production and production) via Azure AD Connect synchronization when applicable.
- Provide local administrative rights on the server(s) for administrative tasks.
- Enable the underlying directory with LDAPS using a valid certificate for the entire implementation.
- Define role criteria and enter the SIS queries; define population selections for bulk mechanics; configure Okta/Azure as required for an end-to-end implementation; add desired container(s) to the directory to store accounts.

Baseline attribute synchronization

The following attributes will be synchronized as part of the baseline Ethos integration data models:

EUP Element	Target Attribute (example)	Description
principal	samAccountName	Username
givenName	givenName	Given name
middleName	middleName	Middle name
familyName	sn	Last name
preferredGivenName	(e.g., givenName)	Optional preferred given name
emailAddress	mail	Sourced from GOREMAL
udcIdentifier	(e.g., employeeNumber)	Unique SIS-generated identifier used to enable SSO
bannerId	(e.g., employeeId)	Unique SIS-generated identifier
Password	userPassword	Randomly generated password

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EUP Element	Target Attribute (example)	Description
Roles Assigned	memberOf	Group memberships (group name mapping 1:1; group object must have objectClass=groupOfNames)

Roles assigned in Banner that do not exist in the directory will have a group object created.

6.1.3 Integrations

Assumptions / Ellucian responsibilities

- Proposed architecture will be approved by Ellucian Architects and will leverage baseline ERP APIs.
- Ellucian assumes the Client will adopt Ellucian standard tools and technologies for integrations. Use of other integration technologies requires mutual agreement and may incur additional time/cost (change requests).
- Third-party integration technologies beyond Ellucian technologies are not used unless mutually agreed.
- Integrations are considered application-to-application, headless data transfer mechanisms using flat files or REST APIs.
- Assessment will determine scope and complexity; changes to file/API specifications not documented during the Assessment Phase will require additional time and be considered a change request. New file handling or transformations involving crosswalks or a changed design approach will also require a change request.
- File/API specifications must be defined and available before project initiation.
- Ethos Integration must be enabled and fully configured in Client non-production and production instances.
- Ellucian assumes the Client has completed Ellucian-provided product training and can produce test data; production and non-production instances must be available for end-to-end testing.
- Configuration and deployment will be in a SaaS environment, with one non-production and one production environment only.
- Product-delivered and partner-delivered integrations are assumed to be deployed as-is; identification of additional use cases during assessment will require a Change Order.
- Delivery phase for partner-developed integrations enables Ellucian to configure Ethos integration tailored to the partner's requirements. An NDA may be required with third-party vendors if involved.
- Source code for delivered integration is not intended to be distributed.

Workday Finance Integration

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- The integration between the Banner SaaS solution and Workday Finance has not included within the scope of services defined within this Statement of Work. Accordingly, the services herein should not be interpreted as including discovery, design, development, testing, deployment, or ongoing maintenance for the Workday Finance integration;
- Workday Finance is the future-state finance platform and the integration is required to support cross-system business processes, the parties will add the Workday Finance integration to the modernization program as a separately identified scope item, subject to integration discovery and mutually agreed pricing and timeline;
- Ellucian will conduct focused discovery to document business use cases, directionality, frequency, data objects, security, error handling, reconciliation, and Workday interface/API requirements;
- Following discovery, Ellucian will provide a written integration design, complexity classification, level-of-effort estimate, delivery schedule, and price;
- No Workday Finance integration development will begin until the parties execute a mutually agreed change order or separate work order;
- The incremental Workday Finance integration price is in addition to the current pricing; and
- Any Workday licensing, Workday professional services, Workday tenant configuration, Workday API enablement, or third-party middleware/services are Client responsibilities unless expressly added to the final scope.

Client Responsibilities

- Complete required vendor contractual obligations (for example, NDAs) before engagement and manage vendor communications for sample files or sandbox/production API access.
- Provide documentation about existing integrations/interfaces (API specs, interface matrices, sample data, etc.).
- Provide third-party application knowledge or bring a third-party integration expert if Client lacks expertise or availability.
- Identify and prioritize integration development projects and dependencies that affect timelines.
- Provide approval on all project activities, artifacts, and outcomes per agreed sign-off criteria; provide acceptance test cases before development starts (Client will execute these during UAT).
- Provide technical reference materials and coordinate meetings with vendor technical contacts as needed.
- Provide designated Ethos Connected Partner non-production and production environments for deployment, available for Ellucian remote access with required privileges for the engagement.
- Provide resources to assist with testing Ethos and Ethos Connected Partner components and to execute the test plan in the designated non-production environment; provide timely system support to maintain operation and availability.

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- Provide test data in the designated non-production environment and a Customer Success Center account login for Ethos setup.
- Provide proper setup, configuration, and delivery of the Ethos Connected Partner system and fully configured single-sign-on (SSO) or SAML with third-party vendors as required.
- Provide acceptance of project activities, artifacts, and outcomes within one week of delivery and participate in project status meetings.

Out of Scope

- Development of client-specific custom integrations that are unique to the Client's business processes or technical environment.
- SAML single sign-on setup (out of scope); third-party SSO setup is not supported by this service.
- Services related to implementing non-Ellucian tools.
- Delivery or implementation services for integrations not referenced in the Overview section.
- Formal training on Ellucian integration tools, including consulting or training services around Ellucian's integration toolset.
- Distribution of source code for integrations.
- Configuration support for existing Ellucian partner integrations.
- Deployment, setup, and configuration of Ethos Essentials, Ellucian Workflow, or Ellucian Central Workspace environments (unless included elsewhere in this SOW).

6.1.4 Central Workspace Card/EIP Consulting

Assumptions / Scope

- Prerequisites:
    - Ethos Integration APIs must be installed, configured, mapped, and responding successfully in the Client environment.
    - The Client environment must have Ellucian Central Workspace Premium (minimum) installed and configured.
- The architecture will aim to be SaaS-compatible and will be approved by Ellucian Architects and leverage baseline ERP APIs
- Ellucian determines resource types required; this service assumes Client adoption of Ellucian standard tools and technologies—other tools require mutual agreement and may affect schedule and cost.
- Ellucian will be responsible for testing in one non-production environment and for promoting and validating integration code to production; additional work requires a change request.

Client responsibilities (Central Workspace Card projects)

- Complete required vendor contractual obligations (NDAs) before engagement; manage vendor communications for sample files or environment access.

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- Provide documentation of existing integrations/interfaces, third-party application knowledge, and identify/prioritize Central Workspace card projects.
- Provide approvals, technical reference materials, acceptance test cases before development starts, and sample/test data in non-production.
- Identify card project dependencies that will impact timelines and coordinate priorities with Ellucian PM.

6.1.5 Data Conversion

Client Responsibilities

- Create complete data extracts from legacy systems in the format defined by Ellucian; create separate extract files for each Banner table unless otherwise specified in data mapping documents; create crosswalk tables as necessary.
- Verify and validate converted data into the designated Banner non-production environment according to a Client-developed UAT plan.
- Provide approval to proceed and sign off on the converted data set in non-production before the production cycle and provide final conversion sign-off into production.

6.1.6 Project Management

- Ellucian and the Client will use an Ellucian-provided Project site that serves as the single source of project status and provides a project status dashboard and project artifacts.
- The Client must assign a project manager and adopt a formal internal project management structure in addition to the Ellucian project manager.
- Client responsibilities for project governance:
    - Provide information to the Ellucian project team per the agreed schedule to support project activities and document development.
    - Provide acceptance approval for project tasks and Change Requests (CRs); task completion is determined per agreed sign-off criteria and the Client acceptance period.
    - Review and mark tasks as verified once Ellucian marks them as complete on the Project Site.
    - Change requests will be documented and require approval signatures from both Client and Ellucian representatives.
    - Attend and participate in project status and stakeholder meetings; support Ellucian during all project activities.
    - Provide timeline approval for project change requests prior to their start.
    - Provide Ellucian consultants appropriate remote connectivity and required access to Client systems and Ellucian products that form part of the engagement.

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7 Technical Modernization - Appendix A:

Appendix A contains the integrations, reports, and customizations identified during the pre-sales assessment process that require evaluation as part of the Technical Modernization engagement. **Inclusion of an item in Appendix A does not imply that the item will be recreated, redeveloped, or replaced.** The purpose of the Technical Modernization engagement is to evaluate each item and determine the most appropriate remediation approach to support SaaS adoption.

Remediation Categories:

A. **Baseline Solution Available** - A delivered Ellucian SaaS capability exists that can be used to achieve the intended business outcome.

B. **SaaS-Safe Solution Available** - The intended business outcome may be achieved through an approved SaaS-safe approach, including delivered extensibility capabilities, productized solutions, or other supported technologies.

C. **No Supported SaaS Solution Identified** - No currently supported SaaS capability or approved SaaS-safe solution has been identified to achieve the intended business outcome. The Client may elect to adopt an alternative business process, implement a manual workaround, pursue a third-party solution, or engage Ellucian under a separate agreement for additional assessment or development services.

7.1 Customizations

Not included in pre-contract assessments.

7.2 Integrations

Not included in pre-contract assessments.

7.3 Reports

Not included in pre-contract assessments.

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SaaS-to-Ellucian Student Signature Statement of Work

Phase 2

Texas Southern University

September 21, 2026

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Phase 2 – SaaS-to-Ellucian Student Signature

1 Overview

1.1 Purpose of Engagement

This Statement of Work (SOW) defines the professional services to be provided by Ellucian to support the Client's adoption of Ellucian Student Signature from its existing live Banner SaaS environment.

The engagement builds on the Client's Banner SaaS foundation, following a Technical Modernization and focuses on validating already-adopted capabilities, remediating material gaps to the current prescriptive model, and implementing net-new Signature capabilities and assets included in scope.

The work described in this SOW is structured as a delta-adoption engagement so that functionality already live and materially aligned is not reimplemented.

Ellucian will deliver services aligned to the Ellucian Student capability framework with the objective of enabling adoption of industry best-practice configurations and processes. Prior to execution of this SOW, available assessments and information gathered during the sales process, together with applicable findings and outputs from the Client's Technical Modernization engagement, are used as inputs to the initial scope and delivery planning for this engagement. A targeted Sprint 0 will be conducted to validate these inputs, confirm implementation assumptions and dependencies, and identify any additional considerations for the Ellucian Student Signature implementation. Findings identified during Sprint 0 may result in adjustments to scope, effort, timeline, or delivery approach and, where applicable, will be managed through the Change Control process.

1.2 Program Objectives

The program is designed to achieve practical, measurable outcomes.

- Advance the Client's existing Banner SaaS operating model to the contracted Ellucian Student Signature capability model
- Validate already-live capabilities against the current prescriptive model and remediate material gaps
- Implement net-new Signature capabilities, prebuilt assets, and supporting services included in the contracted scope while minimizing customizations and manual interventions
- Preserve and extend a scalable SaaS foundation for future growth, innovation, and continuous improvement

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The program prioritizes prescriptive adoption and efficient advancement from the existing SaaS baseline over re-creation of current local variations. This is critical to the quality performance of the Signature agent long-term.

1.3 Definition of Success

Success will be measured by the Client's ability to operate effectively within the delivered capability model.

- End-to-end business workflows are operational and validated
- Data is accurate and supports required processes
- Integration and reporting function as part of the capability
- Users can execute responsibilities within the system
- The Client operates the changed and newly adopted footprint aligned to the Ellucian Student Signature model

Success is measured at the capability level according to the contracted scope and expected outcome for each SaaS-to-Signature capability. Already-live capabilities designated for validation are confirmed as materially aligned to the current prescriptive model, capabilities requiring remediation are brought into alignment, and net-new capabilities are implemented and demonstrated in an operational context aligned to defined business outcomes. The success indicators described in this section are provided for program context and intended outcomes only. Formal contractual acceptance of capabilities is governed exclusively by Section 10 (Acceptance Criteria and Signoff).

1.4 Delivery Philosophy

Ellucian will deliver using a prescriptive, capability-based approach. This approach is prescriptive by design, leveraging preconfigured data, workflows, and templates to ensure consistency, reduce risk, and accelerate time-to-value.

- The starting point is the Client's existing Banner SaaS environment, assessed against the current Ellucian Student Signature baseline
- The focus is on validating existing aligned adoption, remediating material gaps, and adopting net-new delivered configurations, workflows, reporting, and prebuilt assets
- Work is organized around capabilities rather than individual products or modules

Not every existing local variation, customization, extension, or process will be carried forward. Prescriptive adoption is the default, and retained exceptions require documented business justification with acceptance of implications and appropriate approval.

Applicable outputs from the Client's Technical Modernization engagement provide the foundation for implementation of the prescriptive Ellucian Student Signature model. During Discover, Ellucian validates these outputs, confirms dependencies and sequencing, and identifies any delivery impacts required to execute the agreed scope. Any newly identified

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material variation that changes contracted effort or outcomes is governed through the established validation and change control processes.

1.5 Scope Alignment

The services defined in this SOW align to the Ellucian Student Signature offering for a Client that has completed Technical Modernization and will be progressed through structured capability-by-capability execution. The contracted scope is informed by applicable pre-sales assessments. Any additional scope identified during Discover or subsequent delivery activities will be evaluated and, where applicable, managed through the Change Control process.

1.6 Roles and Responsibilities Summary

Successful delivery requires active participation from both Ellucian and the Client.

Ellucian will:

- Provide capability-aligned consulting and delivery resources
- Guide adoption of standardized processes and configurations
- Lead delivery coordination across all phases

The Client will:

- Provide timely access to designated stakeholders and subject matter experts aligned to each capability
- Actively participate in process alignment, decision-making, and validation activities throughout delivery
- Maintain ownership of institutional policies, data accuracy, and validation of operational outcomes
- Review and confirm process designs, workflows, and capability outputs within agreed timeframes
- Provide required inputs to support data readiness, configuration, and end-to-end workflow execution
- Ensure availability of resources to support testing, validation, and acceptance activities
- Align institutional practices to the baseline capability model, including adoption of standard processes where required
- Detailed Client responsibilities are further defined in Section 7.6 (Client Responsibilities and Participation).

The Client acknowledges that successful delivery is dependent on timely participation, decision-making, and validation. Delays in these activities may impact delivery sequence, timelines, and readiness for acceptance.

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2 Ellucian Student Solution & Capability Model

2.1 Overview

Ellucian Student is a unified, SaaS-based solution designed to support the full student lifecycle through integrated capabilities.

It consolidates historically separate systems into a single operating model built on shared data, standardized processes, and platform-enabled automation.

From a delivery perspective, the solution is not implemented one product at a time. It is delivered as a set of capabilities that operate together.

Value is realized when these capabilities are adopted and used as intended, not when individual components are configured in isolation.

2.2 Pillars

Ellucian Student organizes functionality into a set of pillars representing major operational domains within the institution.

These pillars are connected through shared data, workflows, and platform services.

- Curriculum (General and Core)
- Recruiting and Admissions
- Student Aid
- Student Success: Accounts Receivable (AR)
- Student Success: Student Progression

2.3 Capabilities in Scope

Work under this Statement of Work is defined and governed at the business capability level. Ellucian will deliver the Services using a capability-based implementation approach, meaning work will be planned, sequenced, configured, validated, and accepted based on the business capabilities identified below rather than by standalone product, module, or legacy solution.

The following business capabilities are in scope under this Statement of Work.

Curriculum (General and Core)
Capabilities supporting foundational student system administration, curriculum structure, curriculum management, and related academic framework processes required to operate the institution’s student environment.

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Recruiting & Admissions
Capabilities supporting prospect engagement, application management, admissions processing, Lead Generation and related enrollment initiation activities.

Student Aid
Capabilities supporting financial aid administration, aid application and processing activities, packaging and disbursement, and related student funding processes.

Student Success: AR
Capabilities supporting student financial account activity, tuition/fees, receivables, student account administration, housing/residential financial dependencies.

Student Success: Student Progression
Capabilities supporting onboarding, registration, records, advising, academic progress, support services, conferral, retention, and transfer articulation.

Please note that the below capability-based structure is indicative and not every underlying product feature, enhancement, regional variation, or future-state workflow is included automatically. Only those Services necessary to implement the in-scope business capabilities, as further described in this Statement of Work and its appendices, are included.

Pillars and Operational Capabilities

- Curriculum (General and Core)
  - General and Core
  - Veteran Student Services
  - Student Transportation Services
  - Curriculum Design
  - Curriculum Change Management
  - Course Management
  - Academic Faculty Load Management
  - Recruiting & Admissions
  - Student Application Management
  - Student Admissions Decision Management
  - Prospective Student Engagement
  - Domestic Student Recruitment
  - International Student Recruitment
  - Lead Generation
- Student Aid
  - Student Financial Aid Administration
  - Student Financial Aid Application Management
  - Student Financial Aid Counseling
  - Student Financial Aid Packaging and Disbursement

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    - Student Government Sponsored Aid Management
- Student Success: AR
    - Student Tuition and Fees Processing
    - Student Accounts Receivable
    - Student Accounts Administration
    - Student Housing and Residential Living
    - Student Success: Student Progression
    - Student Onboarding and Orientation
    - Degree Declaration
    - Student Registration
    - Grading and Feedback
    - Student Grades Management
    - Conferral Eligibility Management
    - Commencement Event Management
    - Student Conferral Processing
    - Co-Curricular Transcripts
    - Student Academic Policy Management
    - Student Records and Details Management
    - Enrollment Status Management
- Academic Year Scheduling
    - Teaching and Learning Compliance and Regulatory Reporting
    - Student Conduct
    - Academic Advising
    - Field Placement/Externship Management
    - Student Accessibility Services
    - Student Wellbeing Services
    - Athletic Student Services
    - Veteran Student Services
    - Student Academic Support Services
    - International Student Services
    - Student Engagement, Inclusion, and Leadership Development
    - Student Engagement and Retention
    - Student Transfer Articulation

2.4 Capability-Based Delivery Model

Delivery is structured around capabilities as the unit of execution.

- Work is planned, executed, and validated at the capability level
- Each capability is treated as a complete unit of delivery
- Integration, reporting, and platform elements are included within each capability
- Capabilities are sequenced based on a defined roadmap

Each capability includes embedded data, integration, and reporting elements required to achieve operational readiness, which serves as the basis for validation and acceptance.

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Validation of capability readiness for operational use is performed jointly by Ellucian and the Client to confirm alignment to intended business outcomes.

This validation includes confirmation that:

- The intended business process of the capability can be executed using the Ellucian solutions available within the respective pillar
- The capability has been tested for accuracy and completeness relative to its defined outcome
- The capability supports operational execution by designated users

Such validation supports readiness for acceptance evaluation and does not constitute formal acceptance. Formal acceptance of all capabilities is governed exclusively by Section 10 (Acceptance Criteria and Signoff).

2.5 Mapping Capabilities to Institutional Outcomes

Curriculum (General and Core): These capabilities support the academic foundation and execution of core institutional processes.

- Streamlined curriculum and program management
- Improved accuracy of academic records
- Efficient enrollment and registration processing
- Reliable academic lifecycle execution

Recruiting & Admissions: These capabilities enable institutions to attract, engage, and convert prospective students more effectively.

- Increased application completion rates
- Improved enrollment conversion and yield
- More effective prospective student engagement
- Greater visibility into recruitment funnel performance

Student Aid: These capabilities ensure students can access, understand, and act on financial resources efficiently.

- Faster financial aid packaging and disbursement
- Improved compliance with regulatory requirements
- Increased student financial clarity and confidence
- Expanded access to funding opportunities

Student Success: These capabilities focus on improving outcomes across the student lifecycle through engagement and support.

- Improved retention and progression
- Increased on-time completion
- More effective advising and intervention
- Earlier identification of at-risk students

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For clarity, changes in underlying operational capabilities, workflows, or delivery activities will only affect this Statement of Work to the extent they materially impact an in-scope Pillar. Any such impact will be addressed through the governance and change control mechanisms set forth in this Statement of Work.

2.6 Platform, Integration, and Reporting

Platform services, integrations, and reporting are embedded within each capability.

- Integration enables required data flow
- Reporting provides operational visibility
- Platform workflows enable automation

3 Delivery Methodology (Navigate to SaaS)

3.1 Overview

Ellucian delivers this engagement using a prescriptive, capability-based delivery methodology aligned to the Navigate to SaaS lifecycle.

This is not a traditional phased implementation organized around systems or functional silos. It is a structured progression designed to advance the institution from its existing Banner SaaS baseline to the contracted Ellucian Student Signature target state.

The methodology is built on three principles:

- **Deliver outcomes, not components** – Work is organized around end-to-end capabilities that enable institutional operations
- **Adopt, do not recreate** – The starting point is a proven baseline of configurations, workflows, and data structures
- **Progress with control and clarity** – Each phase includes defined entry and exit criteria to ensure readiness before moving forward

Work progresses iteratively. Each stage has clear expectations, defined deliverables, and explicit validation points.

The result is an efficient delivery model that preserves already-live aligned functionality while focusing delivery effort on validation, prescriptive remediation, and net-new Signature adoption. All delivery activities are executed and measured at the capability level, ensuring alignment between scope definition, execution, and acceptance.

3.2 Phases

The delivery lifecycle is structured into three phases:

- Discover
- Build

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- Optimize

Each phase is adapted to the Signature delivery model and is focused on efficient adoption of the predefined baseline.

3.2.1 Discover

The Discover phase establishes the foundation for delivery by validating the contracted SaaS-to-Signature scope, confirming dependencies, and preparing the organization for execution.

Applicable pre-sales assessments and outputs from the Client's Technical Modernization engagement are formal inputs to Discover. Discover does not repeat a broad Banner SaaS modernization assessment or reopen unchanged functionality that is outside the contracted Signature delta.

Key outcomes include:

- Validation of pre-sales findings and the contracted Validate / Remediate / Implement capability status
- Confirmation of material prescriptive-template remediation and approved exceptions
- Confirmation of integration, reporting, targeted data, testing, and training impacts for the changed footprint
- Establishment of a capability-based delivery roadmap and sequencing plan for the contracted Signature delta

This phase reduces implementation risk by ensuring that scope, expectations, dependencies, and constraints are clearly understood before execution begins.

3.2.2 Build

The Build phase is where already-live capabilities are validated, identified gaps are remediated, and net-new Signature capabilities are configured, validated, and prepared for operational use.

Work is executed iteratively but always anchored to defined capabilities rather than technical components.

Key characteristics:

- Capabilities are addressed according to their contracted delivery status: Validate, Remediate, or Implement, including the process, targeted data, integrations, reporting, and workflow elements required for the changed footprint
- Targeted data alignment and enablement activities are governed by Section 6.2. Broad Banner ERP data migration is not part of the standard SaaS-to-Signature engagement.

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- Current prescriptive configurations are adopted as the default, with existing aligned SaaS configurations retained and non-prescriptive variations remediated unless an approved exception applies
- Work is sequenced based on the delivery roadmap and institutional priorities
- Completed capabilities are validated individually before being integrated into broader workflows

A capability is only considered complete for delivery progression when:

- Applicable validation, remediation, or net-new configuration is finalized
- Required targeted data and configuration inputs are validated
- Integrated workflows function as expected
- The capability can be executed operationally by users. The capability demonstrates operational readiness aligned to defined business outcomes, subject to formal acceptance criteria defined in Section 10. These criteria are used solely to determine delivery progression and do not constitute formal acceptance or contractual completion of the capability.
- This ensures progress is measured by operational readiness, not partial configuration.

3.2.3 Optimize

The Optimize phase transitions the institution from implementation to sustained operation.

This phase begins during final validation and continues through initial production use.

Key outcomes include:

- Execution of go-live and transition activities
- Support for users as they begin operating new or materially changed Signature capabilities and workflows
- Stabilization of changed processes and newly adopted capabilities based on real-world usage
- Transition to ongoing ownership and continuous improvement

It is a controlled transition to steady-state operations, ensuring the institution can independently operate the delivered Signature delta within its existing Banner SaaS environment.

3.3 Stage Gates

Progression through the methodology is governed by stage gates.

These are formal checkpoints that ensure the project is ready to advance, not simply complete with activities.

Each stage gate requires:

- Completion of defined work for the current phase

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- Validation of delivery outputs and confirmation of readiness for progression by the institution
- Review and resolution of risks, issues, and dependencies
- Incorporation of lessons learned into subsequent planning

Advancement to the next phase is based on readiness and alignment, not timeline pressure.

This structure provides:

- Clear accountability across both teams
- Early identification of risks or misalignment
- Confidence that each phase builds on a stable foundation

3.4 Capability Execution

The criteria described in this section define capability completion for delivery execution and progression purposes only. These criteria are used to determine readiness to advance through delivery stages and do not constitute formal acceptance.

Ellucian will execute implementation using a capability-based delivery model aligned to the in-scope business capabilities identified in this Statement of Work. Implementation activities may therefore be organized, sequenced, and staffed around capability delivery rather than around individual products or legacy solution workstreams.

Formal acceptance of all capabilities is governed exclusively by Section 10 (Acceptance Criteria and Signoff).

Execution within each phase is organized around capabilities as the unit of delivery.

For SaaS-to-Signature delivery, each scoped capability is assigned one of three delivery statuses:

- Validate - the capability is already live and materially aligned to the current prescriptive model. Delivery is limited to lightweight confirmation of alignment and material dependencies.
- Remediate - the capability is live but contains material gaps from the current prescriptive model. Delivery addresses the contracted gaps and impacted dependencies.
- Implement - the capability is not currently adopted. Applicable Signature implementation activities are performed for the contracted capability.

The status defines the level of services required and prevents reimplementation of functionality that is already live and materially aligned. Unchanged Banner SaaS functionality outside the contracted Signature delta is not reimplemented or re-accepted through this engagement.

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Rather than delivering isolated functionality, each capability is treated as a complete operational outcome. The scope of each capability is defined in Section 5, and acceptance is governed by the criteria defined in Section 10.

For each capability:

- Business processes are validated against the baseline model and are defined or adjusted where remediation or net-new implementation is required
- Required configurations are validated, remediated, or established according to the contracted delivery status
- Targeted data and configuration inputs required for the changed footprint are validated and aligned to expected usage
- Supporting integrations and reporting are included
- End-to-end workflows are tested and confirmed

Capabilities are delivered in a sequenced roadmap, ensuring dependencies are respected and institutional priorities are addressed.

This approach ensures:

- Integrated delivery – platform, data, and workflows are addressed together
- Reduced duplication – work is not repeated across functional areas
- Faster time to value – capabilities become usable as they are completed

Completion is validated at the capability level before progressing to broader system validation.

Once all in-scope Validate, Remediate, and Implement activities are complete:

- The changed and impacted solution footprint is validated end-to-end
- Users are prepared to operate within the new model
- The institution transitions into readiness for deployment of the contracted Signature delta

Completion is validated for delivery purposes to confirm readiness for progression and end-to-end system validation.

Formal acceptance and signoff of capabilities are governed by Section 10 and require explicit confirmation by the Client.

This model replaces fragmented implementation with a cohesive, outcome-driven delivery approach, ensuring the institution is prepared to operate effectively on day one.

Capability acceptance is based on demonstrated operational use, not configuration completion. Acceptance is explicitly tied to the capability's defined business outcomes and its ability to operate within the broader institutional workflow model.

A capability is considered ready for acceptance evaluation when:

- End-to-end workflows can be executed by designated users

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- Required data supports those workflows accurately
- Embedded integrations and reporting function within the context of the capability
- The institution confirms readiness to operate that capability in production

These criteria support readiness assessment and validation only and do not establish acceptance thresholds or contractual completion standards, which are governed exclusively by Section 10 (Acceptance Criteria and Signoff).

Where existing institutional configurations or requirements differ from the current prescriptive model, Ellucian will guide alignment to standard practices. Prescriptive adoption is the default. Retained exceptions require business justification, acceptance of implications, approval and are evaluated based on impact to delivery timelines, complexity, supportability, and long-term sustainability.

Capability validation performed during execution supports readiness for acceptance but does not constitute formal acceptance until all criteria defined in Section 10 are met.

4 Delivery Approach (Capability-Based Execution)

4.1 Best Practices Adoption Model

This delivery approach is intentionally best practices focused.

The model reflects proven best practices, aligned processes, and integrated workflows designed to operate effectively in a SaaS environment.

Adoption of this model is a core expectation of delivery. Deviation from the best practices model is controlled and governed through defined decisions and change control processes. Deviations will require signoff from the Client executive sponsor.

Ellucian will:

- Guide the institution toward alignment with best practices
- Identify where existing Banner SaaS processes, configurations, or extensions diverge from the current prescriptive baseline
- Recommend adjustments to support efficient and sustainable operations

Where deviations are required, they are evaluated based on:

- Business necessity
- Impact on delivery timelines and complexity
- Effect on long-term maintainability and scalability

This is not a flexible-by-default model. It is a controlled adoption model designed to:

- Accelerate time to value
- Reduce delivery risk
- Maintain consistency across capabilities

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4.2 Capability Sequencing and Dependencies

Capabilities are not delivered independently. They are executed according to a sequenced delivery roadmap.

This sequence reflects:

- Dependencies between capabilities
- Data and process relationships
- Institutional priorities and operational timelines

The roadmap serves as the single source of delivery alignment, governing:

- Execution order of capabilities
- Resource planning and delivery coordination
- Readiness for validation and transition activities

This structured sequencing ensures that:

- Capabilities are delivered in a logical and sustainable order
- Dependencies are resolved before they impact downstream work
- The institution progresses toward end-to-end operational readiness

4.3 Delivery Roles and Team Structure

Delivery is executed through a coordinated team model aligned to capabilities.

Resources are organized to support end-to-end delivery, rather than isolated functional execution.

This includes:

- Capability-aligned resources responsible for outcome delivery
- Supporting roles focused on configuration, data, and technical execution
- Central coordination to maintain delivery alignment and progress tracking

This structure reduces handoffs, minimizes duplication, and improves delivery continuity across capabilities.

The model is designed to ensure that each capability is delivered with:

- Clear ownership
- Consistent execution approach
- Alignment to defined outcomes and acceptance criteria

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5 Capability Delivery Scope

5.1 Scope Overview

This section defines the capability-level scope of delivery.

Work is structured and executed based on business capabilities, representing what the institution must be able to operate, not the individual systems or components used to enable those capabilities.

SaaS-to-Signature Delivery Status Model

Each in-scope Operational Capability is assigned one of the following contracted delivery statuses based on the pre-sales Mods Studio findings and capability adoption profile:

- **Validate** — The Operational Capability is already live and materially aligned to the current prescriptive model. Services are limited to the confirmation necessary to verify alignment and identify any material exception or dependency.
- **Remediate** — The Operational Capability is already live but contains one or more contracted material gaps from the current prescriptive model. Services are limited to the remediation activities and affected dependencies necessary to address those identified gaps.
- **Implement** — The Operational Capability is not currently adopted by the Client. Applicable implementation services are performed for the contracted Operational Capability in accordance with the delivery scope defined in this SOW.

The assigned delivery status determines the level of services applicable to each Operational Capability. The detailed Delivery Scope descriptions in the tables below describe the activities that may apply when an Operational Capability is designated Remediate or Implement. An Operational Capability designated Validate does not automatically receive the full implementation activities described for Remediate or Implement Operational Capabilities.

Depending on the assigned delivery status and contracted scope, applicable delivery activities may include:

- Definition of target business processes aligned to the baseline model
- Configuration and enablement required to support those processes
- Supporting data, integrations, and reporting embedded within the Operational Capability
- Validation of end-to-end operational readiness

Formal Pillar acceptance criteria are defined in Section 10.

Applicable data, integration, and reporting activities expressly included in the contracted scope are delivered in accordance with the responsibility models and scope boundaries defined in Section 6 and Appendix C.

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Scope is not defined by isolated activities or technical components. It is defined by the contracted Pillars and their in-scope Operational Capabilities.

Capabilities are delivered according to the sequenced roadmap, ensuring alignment to dependencies, institutional priorities, and overall delivery progression.

Scope Control Principle

The services described in this Statement of Work are limited to those activities required to deliver the defined capabilities to a state of operational readiness.

Any activity not explicitly required to enable an in-scope capability to achieve operational readiness is considered out of scope, unless otherwise agreed through the Change Control Process defined in Section 9.

Scope is defined by capability outcomes and the contracted Validate / Remediate / Implement status, not by individual tasks, historical practices, or prior implementation effort.

Requests that extend beyond the defined capability outcomes, introduce new use cases, or require additional integrations, reporting, or data structures not required for operational readiness are considered out of scope and subject to Change Control.

Scope Limitations for the Existing Banner SaaS Environment

This SaaS-to-Signature engagement is scoped for a Client live on Banner SaaS, following Technical Modernization. Availability, maturity, configuration approach, integration model, data model, and delivery path for certain Signature capabilities may vary based on the Banner SaaS product components currently adopted by the Client and the current state of Ellucian Student product availability.

The inclusion of a pillar, business capability, or operational capability in this Statement of Work does not imply that every related product capability, workflow, configuration option, integration, report, automation, or future-state enhancement is automatically included. Delivery depends on the contracted Signature scope, current product adoption, product availability, dependency sequencing, and the applicable Validate / Remediate / Implement status.

During delivery, Ellucian will evaluate applicable capability availability, product maturity, implementation readiness, SaaS dependencies, and Client readiness. Ellucian will recommend whether an applicable capability or operational component should be validated, remediated, implemented using available functionality, deferred until later product availability, delivered through an alternate approved approach, or addressed through a separate project or Change Order.

For clarity, platform-specific differences do not expand the scope of this Statement of Work. Any activity required to deliver functionality, workflows, integrations, data structures, reports, automations, or services beyond the capability outcomes expressly included in this Statement of Work is subject to the Change Control Process defined in Section 9.

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Business Capability Governance

This SaaS-to-Signature engagement is scoped for a Client already live on Banner SaaS. Availability, configuration approach, integration model, data model, and delivery path for certain Signature capabilities may vary based on the Banner SaaS product components currently adopted by the Client and the current state of Ellucian Student product availability.

The inclusion of a Pillar or Operational Capability in this Statement of Work does not imply that every related product capability, workflow, configuration option, integration, report, automation, or future-state enhancement is automatically included. Delivery depends on the contracted Signature scope, current product adoption, product availability, dependency sequencing, and the applicable Validate / Remediate / Implement status.

During delivery, Ellucian will evaluate applicable product availability and implementation readiness where relevant to the contracted scope. If product availability or a product release materially affects an in-scope Operational Capability, Ellucian will provide a recommendation regarding the appropriate delivery treatment. Any resulting change to contracted scope, effort, sequencing, timeline, or acceptance footprint is subject to the Change Control Process defined in Section 9.

Where an in-scope Operational Capability is formally deferred through the Change Control Process, the approved change will document any resulting adjustment to the delivery and acceptance footprint of the applicable Pillar under this SOW.

For clarity, platform-specific differences do not expand the scope of this Statement of Work. Any activity required to deliver functionality, workflows, integrations, data structures, reports, automations, or services beyond the capability outcomes expressly included in this Statement of Work is subject to the Change Control Process defined in Section 9.

Scope remains governed by the capability hierarchy defined in Section 2.3.

5.2 Curriculum (General and Core) Capability Delivery

Operational Capability	Delivery Scope	Outcome Achieved
General and Core	Define and validate foundational administrative and self-service workflows required to establish the core student system operating model. Confirm baseline setup, role-based access patterns, institutional structures, navigation expectations, and foundational configuration dependencies required to support downstream capabilities.	Ability to establish and operate the foundational student system framework required for consistent execution across curriculum, admissions, student aid, student success, and related institutional processes.

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Operational Capability	Delivery Scope	Outcome Achieved
Veteran Student Services	Define and validate veteran student support workflows, including identification, eligibility considerations, service coordination, required documentation, and related compliance or reporting dependencies where included in scope.	Ability to support veteran students through consistent service delivery, appropriate eligibility tracking, and operational visibility into veteran student populations and related institutional responsibilities.
Student Transportation Services	Define and validate student transportation service workflows, including transportation eligibility, service access, pass or permit coordination, related student records, and applicable administrative tracking where included in scope.	Ability to manage student transportation-related services consistently, supporting student access, administrative tracking, and coordination with broader student service operations.
Curriculum Design	Define and validate curriculum design workflows, including program structures, course relationships, academic requirements, catalog elements, approval dependencies, and configuration needed to support the institution's academic framework. Identify required governance decisions and approved variations.	Ability to define and maintain curriculum structures that provide a governed academic foundation for admissions, enrollment, advising, degree planning, student progression, and completion processes.
Curriculum Change Management	Define and validate curriculum change workflows, including proposal, review, approval, versioning, effective dating, and implementation of approved curriculum changes. Identify governance decision points, policy-driven variations, and downstream impacts.	Ability to manage curriculum changes in a controlled, auditable, and consistent manner while protecting the stability of dependent academic and student lifecycle processes.
Course Management	Define and validate course management workflows, including course setup, maintenance, attributes, academic period alignment, scheduling dependencies, and related configuration required to support course availability and delivery.	Ability to manage course information and course availability consistently, supporting academic scheduling, registration, advising, reporting, and instructional planning.
Academic Faculty Load Management	Define and validate academic faculty load workflows, including instructional assignment, workload tracking, academic delivery alignment, and related data dependencies required to support faculty workload visibility where included in scope.	Ability to manage and review faculty workload in alignment with academic delivery needs, supporting instructional planning, operational consistency, and institutional reporting.

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5.3 Recruiting & Admissions Capability Delivery

Operational Capability	Delivery Scope	Outcome Achieved
Student Application Management	Define and validate application intake and processing workflows, including application submission, status tracking, document collection, required validations, and exception handling. Confirm required data dependencies, communication triggers, and validation outputs required to support application processing execution.	Ability to manage student applications end-to-end, including intake, tracking, document verification, and application readiness with operational visibility and consistency.
Student Admissions Decision Management	Define and validate admissions evaluation and decision workflows, including review steps, decision rules, approval paths, decision outcomes, communication processes, and exception scenarios. Confirm validation outputs required to support consistent execution of admissions decisions.	Ability to evaluate applications and issue admissions decisions through consistent, policy-aligned workflows with timely communication and clear operational traceability.
Lead and Prospect Management	Defined lead and prospect management processes, including prospective student identification through centralized student interest networks, targeted outreach and communications, population segmentation and prioritization, interest monitoring, and progression activities. Validation outputs confirming execution of lead and prospect management activities.	Processes are established, validated, and operational for prospective student identification, engagement, communications, segmentation, prioritization, and progression activities aligned to the Ellucian Student operating model.
Prospective Student Engagement	Define and validate prospective student engagement workflows, including inquiry intake, prospect record creation, segmentation, outreach, campaign activity, engagement tracking, and communication patterns. Confirm validation outputs required to support engagement execution across defined stages.	Ability to engage and progress prospective students through defined recruitment stages with visibility into engagement activity, communication history, and pipeline movement.
Domestic Student Recruitment	Define and validate domestic recruitment workflows, including territory or population-based recruitment planning, recruitment activity execution, prospect tracking, event participation, pipeline progression, and related communication patterns. Confirm validation outputs required to support domestic recruitment execution.	Ability to plan, execute, and monitor domestic recruitment activities with measurable pipeline development, prospect engagement, and conversion tracking.

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Operational Capability	Delivery Scope	Outcome Achieved
International Student Recruitment	Define and validate international recruitment workflows, including region-specific engagement, international prospect tracking, recruitment activity execution, communication patterns, and applicable international admissions or documentation dependencies where included in scope. Confirm validation outputs required to support international pipeline execution.	Ability to engage and manage international prospects with regionally aligned recruitment processes, pipeline visibility, and coordination with downstream admissions activities.
Lead Generation	Define and validate lead generation workflows, including lead source capture, inquiry creation, prospect qualification, prioritization, routing, and conversion into recruitment or admissions follow-up activities. Confirm validation outputs required to support lead capture and progression.	Ability to generate, capture, qualify, and route prospective student leads into structured recruitment and admissions processes with clear ownership and follow-up visibility.

5.4 Student Aid Capability Delivery

Operational Capability	Delivery Scope	Outcome Achieved
Student Financial Aid Administration	Define and validate financial aid administration workflows, including aid year setup, administrative processing, student aid status tracking, institutional policy alignment, compliance considerations, exception handling, and coordination with related admissions, enrollment, and student accounts processes. Confirm validation outputs required to support consistent financial aid administration.	Ability to administer student financial aid processes consistently, supporting accurate aid operations, regulatory readiness, student financial clarity, and coordination across the student lifecycle.
Student Financial Aid Application Management	Define and validate student financial aid application workflows, including application intake, required documentation, data validation, eligibility-related inputs, application status tracking, and exception management. Confirm validation outputs required to support accurate and complete financial aid application processing.	Ability to capture, manage, and validate student financial aid applications with clear visibility into application status, completeness, required actions, and readiness for downstream aid processing.

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Operational Capability	Delivery Scope	Outcome Achieved
Student Financial Aid Counseling	Define and validate student financial aid counseling workflows, including student communications, guidance, notifications, required actions, financial aid status visibility, counseling touchpoints, and escalation or exception scenarios. Confirm validation outputs required to support student-facing financial aid communication and guidance.	Ability to help students understand, act on, and manage their financial aid position through clear, timely, and actionable communication and support.
Student Financial Aid Packaging and Disbursement	Define and validate financial aid packaging, awarding, adjustment, disbursement, and reconciliation workflows, including fund assignment, prioritization, allocation, timing, validation, exception handling, and coordination with student accounts where applicable. Confirm validation outputs required to support accurate aid packaging and disbursement execution.	Ability to package, award, adjust, and disburse student financial aid accurately and consistently, supporting timely funding delivery, operational continuity, and compliance readiness.
Student Government Sponsored Aid Management	Define and validate government-sponsored aid management workflows, including sponsored funding eligibility, required documentation, funding source coordination, award tracking, compliance considerations, and exception handling where included in scope. Confirm validation outputs required to support sponsored aid management and related student funding processes.	Ability to manage government-sponsored student aid consistently, supporting funding accuracy, compliance alignment, student visibility, and coordination with broader financial aid and student account processes.

5.5 Student Success: AR Capability Delivery

Operational Capability	Delivery Scope	Outcome Achieved
Student Tuition and Fees Processing	Define and validate tuition and fee assessment workflows, including calculation, application, adjustments, account posting, related dependencies, and exception handling. Confirm validation outputs required to support accurate tuition and fee processing.	Ability to assess and manage tuition and fees accurately, providing financial clarity for students and supporting downstream student account and financial processes.

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Operational Capability	Delivery Scope	Outcome Achieved
Student Accounts Receivable	Define and validate student receivables workflows, including billing, charge assessment, payment activity, balance tracking, reconciliation considerations, and exception handling where included in scope. Confirm validation outputs required to support accurate receivables execution.	Ability to track and manage student receivables with operational visibility, financial accuracy, and continuity across the student lifecycle.
Student Accounts Administration	Define and validate student account setup, maintenance, adjustment, status, and inquiry workflows. Identify required configuration decisions, data dependencies, financial controls, and approved variations. Confirm validation outputs required to support account administration execution.	Ability to manage student financial account activity accurately and consistently across the student lifecycle.
Student Housing and Residential Living	Define and validate student housing and residential living workflows, including housing eligibility, assignment, status tracking, related student records, charge or account dependencies, and exception handling where included in scope. Confirm validation outputs required to support housing and residential service execution.	Ability to manage student housing and residential living activities consistently, supporting residential operations, student service coordination, and related financial or student record dependencies.

5.6 Student Success: Student Progression Capability Delivery

Operational Capability	Delivery Scope	Outcome Achieved
Student Onboarding and Orientation	Define and validate onboarding and orientation workflows, including readiness activities, student communications, required actions, checklist or milestone tracking, and related handoffs from admissions into active student participation. Confirm validation outputs required to support onboarding execution.	Ability to onboard students effectively, ensuring students understand required actions and are prepared for academic engagement and institutional participation.
Degree Declaration	Define and validate degree declaration workflows, including program selection, declaration updates, approval or review steps, effective dating, academic record impacts, and related advising or registration dependencies. Confirm validation outputs required to support accurate degree declaration execution.	Ability for students and staff to declare, update, and manage academic pathways consistently, supporting progression, advising, registration, and completion alignment.

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Operational Capability	Delivery Scope	Outcome Achieved
Student Registration	Define and validate registration workflows, including course selection, eligibility checks, prerequisite or restriction validation, enrollment processing, registration status, add/drop activity, and exception handling. Confirm validation outputs required to support registration execution.	Ability to register students into courses accurately and efficiently, enabling active participation in academic programs while supporting institutional enrollment controls.
Grading and Feedback	Define and validate grading and feedback workflows, including grade entry, performance feedback, communication, documentation, correction processes, and related academic policy dependencies. Confirm validation outputs required to support grading and feedback execution.	Ability to provide grading and feedback in a consistent and transparent manner, supporting student understanding, academic evaluation, and progression.
Student Grades Management	Define and validate student grade management workflows, including grade capture, validation, posting, update, correction, approval, and academic record impacts. Confirm validation outputs required to support accurate grade management execution.	Ability to manage and maintain student grades accurately, supporting academic evaluation, progression tracking, records integrity, and downstream completion processes.
Conferral Eligibility Management	Define and validate conferral eligibility workflows, including requirement evaluation, academic rule application, exception review, eligibility status tracking, and related advising or records dependencies. Confirm validation outputs required to support eligibility determination.	Ability to determine conferral eligibility consistently and accurately, ensuring alignment with academic requirements and readiness for completion processing.
Commencement Event Management	Define and validate commencement event workflows, including candidate identification, participation tracking, event readiness activities, communication, and related operational coordination where included in scope. Confirm validation outputs required to support commencement readiness.	Ability to manage commencement-related activities consistently, supporting institutional completion events and student participation.
Student Conferral Processing	Define and validate student conferral workflows, including completion validation, award processing, credential posting, academic record updates, and related communication or reporting dependencies. Confirm validation outputs required to support conferral execution.	Ability to process student conferrals accurately, ensuring completion recognition, academic record integrity, and downstream credential or reporting readiness.

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Operational Capability	Delivery Scope	Outcome Achieved
Co-Curricular Transcripts	Define and validate co-curricular transcript workflows, including activity capture, achievement tracking, eligibility or inclusion rules, transcript generation, and reporting dependencies where included in scope. Confirm validation outputs required to support co-curricular transcript execution.	Ability to capture and report co-curricular achievements as part of the student record, supporting a broader view of student engagement and accomplishment.
Student Academic Policy Management	Define and validate student academic policy management workflows, including academic standing, repeat rules, grading policy impacts, progression rules, exception handling, and related records or advising dependencies. Confirm validation outputs required to support academic policy execution.	Ability to apply and manage academic policies consistently, supporting accurate student progression, records integrity, and policy-aligned decision-making.
Student Records and Details Management	Define and validate student record management workflows, including student biographical, academic, enrollment, status, and lifecycle data maintenance. Identify required data controls, validation activities, update processes, and dependent reporting or workflow needs. Confirm validation outputs required to support student record accuracy.	Ability to maintain accurate and trusted student records that support admissions, aid, accounts, registration, advising, compliance, reporting, and student success processes.
Enrollment Status Management	Define and validate enrollment status workflows, including status assignment, updates, effective dating, lifecycle changes, reporting impacts, and related downstream dependencies. Confirm validation outputs required to support enrollment status accuracy.	Ability to track and manage student enrollment status accurately, supporting lifecycle progression, compliance reporting, aid, accounts, and institutional visibility.
Academic Year Scheduling	Define and validate academic year scheduling workflows, including academic calendar setup, term structures, period definitions, scheduling dependencies, and related registration or records impacts. Confirm validation outputs required to support academic year scheduling execution.	Ability to establish and manage academic year and term structures that provide the operating framework for enrollment, registration, advising, grading, and completion activities.
Teaching and Learning Compliance and Regulatory Reporting	Define and validate teaching and learning compliance and regulatory reporting workflows, including data capture, reporting inputs, required validations, regulatory dependencies, and exception handling where included in scope. Confirm validation outputs required to support reporting readiness.	Ability to support academic and regulatory reporting requirements with accurate data, defined processes, and operational readiness for compliance-related activities.

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Operational Capability	Delivery Scope	Outcome Achieved
Student Conduct	Define and validate student conduct workflows, including case intake, review, resolution, documentation, status tracking, policy alignment, and related communication or reporting dependencies. Confirm validation outputs required to support student conduct process execution.	Ability to manage student conduct processes consistently, supporting policy compliance, case traceability, student accountability, and institutional governance.
Academic Advising	Define and validate academic advising workflows, including student guidance, academic planning, pathway review, progress monitoring, intervention identification, appointment or interaction tracking, and related advising dependencies. Confirm validation outputs required to support advising execution.	Ability to guide students through academic decision-making, supporting progression, retention, timely completion, and alignment between student plans and academic requirements.
Field Placement / Externship Management	Define and validate field placement and externship workflows, including placement assignment, eligibility, tracking, completion, documentation, and academic requirement alignment where included in scope. Confirm validation outputs required to support placement execution and tracking.	Ability to manage and track field placements and externships, ensuring alignment with academic requirements, experiential learning expectations, and student progression.
Student Accessibility Services	Define and validate student accessibility service workflows, including accommodation intake, review, approval, coordination, communication, service delivery, and related documentation where included in scope. Confirm validation outputs required to support accessibility service execution.	Ability to provide accessibility services consistently, supporting equitable access, accommodation delivery, and student participation across the lifecycle.
Student Wellbeing Services	Define and validate student wellbeing workflows, including outreach, referral, coordination, service tracking, documentation, and escalation or exception handling where included in scope. Confirm validation outputs required to support wellbeing service execution.	Ability to coordinate student wellbeing support consistently, supporting student persistence, engagement, and the overall student experience.
Athletic Student Services	Define and validate athletic student service workflows, including eligibility tracking, service coordination, student athlete support, documentation, and related compliance dependencies where included in scope. Confirm validation outputs required to support athletic student service execution.	Ability to support student athletes consistently, ensuring appropriate service coordination, eligibility visibility, and alignment with academic and institutional requirements.

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Operational Capability	Delivery Scope	Outcome Achieved
Veteran Student Services	Define and validate veteran student support workflows, including identification, eligibility considerations, service coordination, required documentation, and related compliance or reporting dependencies where included in scope. Confirm validation outputs required to support veteran student service execution.	Ability to support veteran students through consistent service delivery, appropriate eligibility tracking, and operational visibility into veteran student populations and related institutional responsibilities.
Student Academic Support Services	Define and validate student academic support workflows, including support service identification, tutoring or assistance programs, referral activity, service tracking, and related communication or reporting dependencies where included in scope. Confirm validation outputs required to support academic support execution.	Ability to provide student academic support services consistently, supporting student success, progression, persistence, and completion.
International Student Services	Define and validate international student service workflows, including international student identification, compliance-related tracking, documentation, service coordination, communication, and related reporting dependencies where included in scope. Confirm validation outputs required to support international student service execution.	Ability to support international students consistently, ensuring appropriate service coordination, compliance readiness, and successful integration into institutional processes.
Student Engagement, Inclusion, and Leadership Development	Define and validate student engagement, inclusion, and leadership development workflows, including participation tracking, engagement activities, student organization or leadership participation, communication, and related reporting dependencies where included in scope. Confirm validation outputs required to support engagement and leadership development execution.	Ability to support student engagement, inclusion, and leadership development activities, strengthening student connection, belonging, participation, and institutional engagement outcomes.
Student Engagement and Retention	Define and validate student engagement and retention workflows, including engagement monitoring, risk identification, intervention activity, outreach, case or activity tracking, and related advising or support dependencies. Confirm validation outputs required to support retention execution.	Ability to identify, engage, and support students who may need intervention, improving persistence, progression, retention, and completion outcomes.

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Operational Capability	Delivery Scope	Outcome Achieved
Student Transfer Articulation	Define and validate student transfer articulation workflows, including transfer evaluation, external coursework review, credit mapping, institutional requirement alignment, application of transfer outcomes, and downstream impacts to enrollment, advising, academic planning, and student progression. Confirm validation outputs required to support accurate transfer articulation execution across the student lifecycle.	Ability to evaluate, apply, and use transfer outcomes accurately and consistently, supporting admissions continuity, enrollment readiness, advising, academic planning, and student progression.

6 Cross-Capability Services (Embedded Enablers)

6.1 Overview of Embedded Services

Certain services are required to enable successful delivery across all capabilities. These services are not delivered as independent workstreams. They are embedded within each capability and executed as part of end-to-end delivery.

Embedded services will be delivered in support of the in-scope business capabilities using a capability-based implementation model. Accordingly, delivery activities may be organized across capability-aligned workstreams and may include coordinated configuration, data, integration, reporting, testing, enablement, and readiness activities necessary to achieve operational readiness for each in-scope business capability.

These services support:

- Data readiness and accuracy
- Integration of processes and information
- Operational visibility through reporting
- Adoption and sustained use of delivered capabilities

Each service is applied in the context of the capability being delivered and is required to achieve full operational readiness of that capability, ensuring alignment to business outcomes, not technical completion.

This approach avoids fragmented execution and ensures that each capability is delivered as a complete, operational unit.

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6.2 Targeted Data Alignment and Enablement

Data activities in this SaaS-to-Signature engagement are targeted to the changed footprint. The Client is already live on Banner SaaS; therefore, broad ERP data conversion or migration is not part of the standard scope.

Targeted data work may include:

- Confirmation of data and configuration elements required for net-new Signature capabilities
- Alignment or remediation of configuration, reference, or other data required to adopt current prescriptive templates
- Product-specific data preparation or migration only where a newly adopted capability expressly requires it and the activity is included in contracted scope
- Validation of changed data and configuration inputs within the affected business processes

Completion is achieved when the targeted data required for the contracted Signature delta supports the applicable workflows and operational outcomes.

6.3 Overview and Responsibility Model

Targeted data alignment is a shared responsibility between Ellucian and the Client. Ellucian provides the applicable guidance, templates, tools, and execution support defined in the contracted scope. The Client retains responsibility for the accuracy, completeness, institutional meaning, quality, and final validation of Client data.

6.4 Standard Targeted Data Approach

Unless otherwise specified, targeted data activities are planned and executed in conjunction with the affected capability rather than through a standalone, multi-cycle ERP migration workstream.

- Identify the data or configuration change required by the scoped capability or remediation item
- Prepare, map, or align the required data using the applicable prescribed structure
- Load or configure the targeted data where assigned to Ellucian
- Validate the changed data in the context of the affected capability and related regression scope

6.5 Banner SaaS Data Alignment

Because the Client is already operating on Banner SaaS, existing ERP production data remains in place unless a specific contracted Signature capability requires targeted data movement, restructuring, or enablement. Ellucian will not perform a broad extraction and reload of the Banner ERP data set as part of this engagement.

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Where Mods Studio identifies configuration or reference-data differences from the current prescriptive templates, the applicable remediation effort is included when expressly reflected in the contracted scope.

6.6 Existing Data and Configuration Validation

For Operational Capabilities designated Validate, data activity is limited to the confirmation necessary to determine that the existing capability remains operational and materially aligned. Existing data that is not affected by the contracted Signature delta is not revalidated through a full migration or reconciliation cycle.

6.7 Product-Specific Data Migration

A newly adopted Signature capability may require targeted migration or initialization of data from an existing solution. Such work is included only when expressly identified in the scoped services. The approach, responsibilities, volume assumptions, and validation requirements will be defined for the applicable capability or service.

6.8 Data Validation and Signoff

The Client is responsible for validating targeted data and configuration changes and confirming that the resulting information is accurate, complete, and usable for the affected business processes. Ellucian will provide validation guidance and support applicable to the contracted activity.

Client confirmation of data accuracy and completeness is separate from formal Pillar acceptance under Section 10.

6.9 Out of Scope

Unless explicitly stated otherwise, the following are out of scope:

- Broad Banner ERP data conversion or migration
- Full extraction and reload of existing Banner SaaS production data
- Data cleansing or correction of source data issues
- Historical data conversion beyond the requirements of a specifically contracted new capability
- Data governance or data ownership activities
- Ongoing data reconciliation after completion of the scoped change

Any additional data activities shall be deemed out of scope unless agreed through the Change Control Process defined in Section 9.

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6.10 Integration and Extensibility

Integration requirements are addressed within each capability to enable required workflows and data flow. Because the Client is already live on Banner SaaS, the engagement includes a standard reassessment of the integrations affected by the Signature target state. It does not assume redevelopment of the Client's entire existing integration estate.

Integration ownership, delivery responsibility, and scope boundaries are governed by the Integration Responsibility Model. Ellucian will perform only those integration activities expressly assigned to Ellucian in that model. All other integrations are the responsibility of the Client unless separately scoped and agreed through Change Control.

This includes:

- Review of existing integrations that support the capabilities and processes affected by the Signature project
- Confirmation of available productized integrations and current prescribed integration patterns
- Identification of existing integrations that can remain unchanged
- Identification and scoping of integrations that require modification, replacement, or retirement to support the Signature target state
- Configuration of productized integrations assigned to Ellucian
- Implementation of net-new integrations only where explicitly contracted and assigned to Ellucian
- Validation of changed integrations within impacted operational workflows

Completion is achieved when the integrations within the contracted changed footprint support the required end-to-end processes. Existing integrations that are not materially affected by the Signature scope are not rebuilt or reaccepted through this engagement.

Ellucian does not provide end-to-end delivery, development, or operational ownership of integrations unless explicitly defined as such in this Statement of Work. Client-owned, partner-delivered, or custom integrations remain outside Ellucian's delivery responsibility unless separately scoped.

6.11 Reporting and Analytics

Reporting and analytics are assessed as part of the SaaS-to-Signature engagement to determine what remains fit for purpose and what incremental work is required for the Signature target state.

This includes:

- Assessment of the current reporting and analytics landscape relevant to the changed Signature footprint

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- Confirmation of existing reports and analytics that can remain in use without modification
- Identification and adoption of applicable Ellucian Student prebuilt reporting and analytics assets
- Identification of material gaps not addressed by existing or prebuilt assets
- Implementation of additional Ellucian-built reporting only where explicitly contracted
- Validation of changed reports and analytics within the context of affected business processes

Reporting is designed to support operational monitoring, decision-making, and applicable regulatory or institutional requirements.

Completion is achieved when the reporting and analytics within the contracted changed footprint enable stakeholders to understand, monitor, and act on the affected capability outcomes. Existing reporting that remains fit for purpose is not automatically redeveloped.

6.12 Testing and Validation

Testing is focused on the changed and impacted footprint rather than repeating broad Banner SaaS transition or ERP-wide user acceptance testing already completed as part of the Client's prior SaaS modernization.

This includes:

- Lightweight validation of already-live capabilities designated Validate
- Testing of remediated configurations, processes, data, integrations, reporting, and workflows
- Testing of net-new Signature capabilities and supporting services
- Targeted regression testing of end-to-end processes materially impacted by the changed footprint
- Confirmation that designated users can execute new or materially changed activities successfully

Testing and validation are aligned to the in-scope business capabilities and the operational outcomes affected by the contracted Signature delta. The breadth of regression testing is based on material impact and risk.

Completion is achieved when the applicable changed capability footprint can be executed in a production-ready state. Unchanged Banner SaaS functionality outside the affected footprint is not subject to broad reacceptance under this SOW. This validation supports readiness for acceptance evaluation as defined in Section 10.

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6.13 Platform Configuration and Workflow Enablement

Platform configuration and workflow enablement are applied only where required by net-new Signature capabilities, contracted remediation, prebuilt asset adoption, or other changes within the agreed scope.

This includes:

- Validation of existing configuration and workflow elements that are already materially aligned
- Configuration or remediation of process rules and decision logic required by the changed footprint
- Enablement of new or materially changed workflow execution across roles and activities
- Alignment of affected workflows to standardized process models and applicable prebuilt assets

Configuration is guided by the current prescriptive baseline, with retained variations evaluated based on business necessity, supportability, and delivery impact.

Completion is achieved when the changed workflows support consistent and repeatable execution of the affected capability processes.

6.14 Training and Enablement

Baseline training and enablement are limited to the new or materially changed Signature capabilities, workflows, and related operating practices introduced through this engagement.

This includes:

- Targeted knowledge transfer and training required for designated users or administrators to operate new or materially changed capabilities
- Guidance materials or enablement outputs required to support the changed workflows
- Support for transition of the contracted Signature delta to operational use

Broad end-user or role-based training beyond the changed footprint may be provided as an optional additional service when separately contracted.

Organizational Change Management is not included in the baseline SaaS-to-Signature services. Change Management, including broader organizational readiness, communications, stakeholder engagement, and adoption planning, may be provided as an optional additional service when separately contracted.

Completion of baseline training and enablement is achieved when the designated users for the changed footprint have received the contracted enablement necessary to support operational use.

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7 Assumptions and Dependencies

7.1 Key Assumptions

The following assumptions are fundamental to the successful execution of this engagement.

- The Ellucian Technical Modernization is complete and the Client is live and operating on Banner SaaS before the SaaS-to-Signature engagement begins
- Existing SaaS capabilities and functionality outside the contracted Signature delta will remain in place and will not be reimplemented unless a material dependency requires scoped change

These assumptions are based on a capability-based, prescriptive delivery model and define the conditions under which delivery outcomes can be achieved.

- The institution will adopt the standard capability model as the baseline for delivery
- Delivery will focus on operational outcomes and prescriptive alignment, not recreation of existing local variations
- Capabilities will be validated, remediated, or implemented according to their contracted delivery status and assessed for end-to-end readiness within the changed footprint
- Work will progress according to the sequenced roadmap and defined stage gates

These assumptions are not optional. They are required to maintain delivery clarity, consistency, and timeline predictability.

7.2 Client Dependencies

Successful delivery requires timely and active participation from the institution.

The Client's detailed responsibilities are defined in Section 7.6 (Client Responsibilities and Participation).

Failure to meet these responsibilities may impact delivery timelines, sequencing, and readiness for acceptance.

The institution is responsible for:

- Providing access to subject matter expertise aligned to each capability
- Participating in decision-making, validation, and acceptance activities
- Supporting alignment to standard processes and practices
- Completing required activities to enable data readiness and operational validation

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Delays in participation or decision-making may impact delivery timelines, sequencing, and readiness.

The institution's engagement is critical to ensure that capabilities can be validated and operated successfully.

7.3 Ellucian Dependencies

Ellucian will provide the resources, guidance, and coordination required to deliver capabilities aligned to the defined scope.

Ellucian is responsible for:

- Providing capability-aligned delivery resources
- Guiding adoption of standardized processes and workflows
- Coordinating execution across all phases and capabilities
- Ensuring delivery progresses according to defined methodology and stage gates

Delivery is dependent on alignment between Ellucian and the institution to ensure consistent execution and validated outcomes.

7.4 Data and Integration Assumptions

Data and integration activities are embedded within each capability and are subject to the following assumptions:

- The institution will provide the targeted data and configuration inputs required for scoped remediation or net-new capability adoption in an accessible and usable format, as prescribed by Ellucian
- Targeted data and configuration changes will be aligned to the current prescribed capability model
- Targeted data alignment and enablement responsibilities are defined in Section 6.2. The Client is responsible for data accuracy, validation, and signoff for all scoped data activities.
- Existing and net-new integrations affected by the Signature target state will be reassessed and prioritized based on capability needs and contracted responsibility
- External systems will be available to support integration validation and testing

Targeted data and integration readiness directly impacts the ability to achieve end-to-end execution of the changed capability footprint.

Incomplete or misaligned data may delay validation and operational readiness.

Integration responsibilities are allocated between the parties as defined in the General Terms. The Client is responsible for ensuring availability, readiness, and support of external

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systems and any integrations not expressly assigned to Ellucian. Delays or defects originating from Client-owned or third-party integrations may impact delivery timelines and are not the responsibility of Ellucian.

7.5 Resource and Staffing Assumptions

Delivery is based on a coordinated team model, Ellucian and the Client, aligned to capabilities.

The following assumptions apply:

- Resources will be assigned to support end-to-end capability delivery
- Roles and responsibilities will align with the delivery model and capability structure
- The institution will assign appropriate resources to support engagement, validation, and adoption
- Resource availability will be maintained throughout the delivery lifecycle

Changes to resource availability may impact delivery sequence, timelines, and capability completion.

Additional details in Appendix B – Roles and Responsibilities (detailed)

7.6 Client Responsibilities and Participation

7.6.1 Overview

Successful delivery of Ellucian Student requires active, timely, and ongoing participation from the Client.

The Client is responsible for providing the resources, inputs, decisions, and validation required to support capability delivery and operational readiness.

Delivery timelines, sequencing, and outcomes are dependent on fulfillment of these responsibilities.

7.6.2 Participation and Resourcing

The Client will:

- Assign qualified resources with appropriate authority and subject matter expertise
- Ensure availability of resources aligned to the project schedule
- Participate in workshops, validation activities, and decision-making sessions
- Provide timely responses, feedback, and approvals

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7.6.3 Decision-Making and Approvals

The Client is responsible for:

- Making timely business and technical decisions
- Approving deliverables, configurations, and targeted data outcomes
- Escalating internal issues that may impact delivery timelines

Delays in decisions or approvals may impact delivery sequencing and timelines.

7.6.4 Data, Integration, and Testing Responsibilities

The Client is responsible for:

- Providing required targeted data and configuration inputs
- Performing validation and reconciliation of targeted data changes
- Supporting integration testing and validation
- Executing user acceptance testing activities
- Confirming readiness for progression between phases

Detailed responsibilities are defined in:

- Section 6.2 (Targeted Data Alignment and Enablement)
- Section 6.3 (Integration and Extensibility)
- Section 10 (Acceptance Criteria and Signoff)

7.6.5 Dependency Management

The Client acknowledges that delivery is dependent on:

- Availability of Client resources
- Completion of Client-owned tasks
- Third-party system readiness
- Internal coordination across teams

Delays in these areas may impact delivery timelines and readiness.

7.6.6 Change Control Alignment

Where Client actions or delays result in:

- Scope expansion
- Rework
- Timeline impacts

These impacts will be managed through the Change Control Process defined in Section 9.

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7.6.7 Shared Accountability Model

Ellucian and the Client operate under a shared delivery model, where:

- Ellucian provides structured delivery, tools, and guidance
- The Client provides institutional knowledge, validation, and ownership

Both parties are expected to collaborate to achieve operational outcomes.

8 Out of Scope

Any activity not explicitly required to enable an in-scope Capability to achieve operational readiness shall be deemed out of scope unless agreed through a Change Order.

No prior statements, assumptions or demonstrations shall be interpreted to expand the scope of services beyond what is expressly defined herein.

8.1 General Exclusions

The following items are explicitly out of scope for this engagement and will not be delivered unless approved through Change Control.

This engagement is designed to deliver standardized capabilities aligned to a prescriptive SaaS operating model. Activities that fall outside this model are considered out of scope.

- Replication or preservation of existing local processes that do not align to the current prescriptive capability model
- Delivery of functionality or workflows beyond the defined capability scope
- Activities not required to achieve end-to-end operational readiness
- Data conversion or migration
- Reimplementation or broad revalidation of already-live SaaS capabilities that are outside the contracted Signature delta
- Redevelopment of existing integrations or reports that are assessed as fit for purpose and are not materially impacted by the Signature scope
- Organizational Change Management unless separately contracted as an optional additional service
- Broad end-user or role-based training beyond the targeted training required for new or materially changed capabilities unless separately contracted

Any items outside of the defined scope may be evaluated through change control. This includes requests that extend beyond the defined capability outcomes or introduce new processes, integrations, or reporting not required for operational readiness.

For avoidance of doubt, any Ellucian Student product capability that is not backed by an approved business-capability-level implementation model is out of scope unless expressly included in this Statement of Work or added through Change Control.

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8.2 Custom Development and Extensions

This engagement does not include development of any custom functionality.

Excluded activities include:

- Development of custom processes, workflows, or logic not aligned to the baseline model
- Creation of custom data structures or extensions outside the defined capability requirements
- Enhancements designed to replicate non-prescriptive prior or local behavior

Where additional functionality is requested, it will be evaluated based on business necessity, delivery impact, and long-term sustainability.

8.3 Non-Standard Integrations

In-scope integrations are limited to:

- Productized Integrations included as part of the Ellucian Student solution
- Additional integrations explicitly identified as Ellucian responsibilities in this Statement of Work

All other integrations are out of scope, including but not limited to:

- Client-developed integrations
- Partner-developed integrations
- Custom integrations not explicitly assigned to Ellucian

Ellucian Productized Integrations rely on adoption of baseline and industry best practice configurations. Deviation with impacts will be managed through the Change Control Process defined in Section 9. Any integration not expressly defined as an Ellucian responsibility is the responsibility of the Client or its nominated third-party.

8.4 Legacy Process Replication

This engagement does not include replication or preservation of existing processes that conflict with the current prescriptive capability model.

Excluded activities include:

- Recreating non-prescriptive workflows, decision logic, or local process variations
- Maintaining institution-specific practices that diverge from the baseline
- Supporting parallel operation of non-prescriptive and target process models

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Delivery is based on adoption of standardized processes, not preservation of non-prescriptive prior behavior.

8.5 Third-Party Systems and Services

This engagement does not include delivery or management of external systems beyond what is required for capability execution.

Excluded activities include:

- Implementation or configuration of third-party systems not required for defined capabilities
- Ongoing management or support of external systems or services
- Responsibility for third-party data quality, availability, or performance

Third-party dependencies must be managed by the Client to ensure they do not impact delivery timelines or operational readiness.

9 Governance and Change Control

9.1 Delivery Management and Readiness (Client Onboarding Program+ EDCC)

9.1.1 Pre-Implementation Readiness (Client Onboarding Program)

Pre-implementation onboarding services (“Client Onboarding Program”) are delivered as a governed readiness track aligned to the Navigate to SaaS (N2S) methodology and commence upon contract signature within the Prepare stage.

9.1.2 Ellucian Delivery Command Center (EDCC)

Client Onboarding Program establishes the conditions required to begin structured delivery and ensures alignment across scope, roles, governance, and readiness considerations.

All readiness and delivery management activities are coordinated through the Ellucian Delivery Command Center (EDCC), which serves as the system of record for:

- Delivery planning and progress tracking
- Risks, issues, and dependencies
- Decisions and governance outcomes
- Change requests and program status

Ellucian will manage onboarding, readiness activities, and governance coordination through the EDCC. The Client will actively participate, complete required readiness activities, and provide necessary inputs to support delivery initiation.

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Progression into the Discover phase is based on demonstrated readiness, including completion of onboarding activities, resource alignment, and participation in governance processes.

Delays in readiness activities or Client participation may impact delivery sequencing and timelines and are managed through the governance processes defined in this section.

9.2 Governance Structure

Governance establishes the framework for decision-making, delivery alignment, and accountability throughout the engagement.

Governance is designed to:

- Maintain alignment between Ellucian and the Client on scope, priorities, and progress
- Enable timely and informed decision-making
- Provide visibility into delivery status, risks, and dependencies
- Ensure readiness for stage progression and acceptance

Governance is applied consistently across all phases and capabilities to support controlled, outcome-driven delivery.

9.3 Program Steering and Oversight

Program oversight is conducted through structured governance activities that provide visibility into delivery progress, risks, and outcomes.

This includes:

- Review of delivery progress against the sequenced roadmap
- Monitoring of risks, issues, and dependencies
- Alignment on priorities, timelines, and readiness for stage progression

Oversight ensures that delivery remains aligned to defined scope, methodology, and outcomes.

9.4 Decision-Making Framework

Decisions are required throughout delivery to support progression, alignment, and issue resolution.

The decision-making framework ensures that decisions are made with appropriate stakeholder involvement, documented, and aligned to delivery objectives.

The decision-making framework ensures:

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- Decisions are made with appropriate stakeholder involvement
- Impacts to scope, timeline, and outcomes are clearly understood
- Decisions are documented and aligned to delivery objectives

Timely decision making is critical to maintaining delivery sequencing and readiness.

9.5 Risk and Issue Management

Risks and issues are actively managed to protect delivery outcomes and timelines.

This includes identification, tracking, impact assessment, and resolution of risks and issues throughout the delivery lifecycle.

Unresolved risks or issues may impact stage gate progression and capability validation.

Governance ensures that delivery progresses based on validated readiness, aligned decision-making, and controlled scope, rather than timeline pressure or incomplete inputs.

9.6 Change Control Process

The Scope Control Principle defined in Section 5 governs all scope determinations. Any activity identified as out of scope must be evaluated and approved through the Change Control Process prior to execution.

Changes to scope, requirements, or delivery approach are managed through a formal change control process.

This includes:

- Identification and documentation of proposed changes
- Evaluation of impact to scope, budget, timeline, and delivery outcomes
- Approval of changes through the defined governance structure

Changes are not automatically accepted. Changes that impact defined capability scope, sequencing, or acceptance criteria are evaluated for alignment to the capability-based delivery model. They are evaluated to ensure alignment with:

- Capability-based delivery model
- Prescriptive adoption approach
- Delivery timelines and resource constraints

Approved changes may result in updates to scope, sequencing, or delivery timelines.

All scope determinations are governed by the Scope Control Principle defined in Section 5. Activities identified as out of scope must be approved through Change Control prior to execution.

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10Acceptance Criteria and Signoff

10.1 Capability-Level Acceptance Criteria

Acceptance Precedence Statement:
This Section 10 defines the exclusive and controlling criteria for formal acceptance and signoff of all capabilities delivered under this Statement of Work.

Any references elsewhere in this document to completion, validation, readiness, or success are provided for delivery execution and progress tracking purposes only and shall not override or modify the acceptance criteria defined herein.

Acceptance of system functionality does not imply acceptance of Client data accuracy or completeness. Client responsibility for targeted data validation remains defined in Section 6.2.

Acceptance is defined at the business capability level, not at the level of individual tasks, configuration activities, or subordinate operational elements, and represents the formal confirmation of completion for contractual and delivery purposes.

For a capability designated Validate, acceptance is based on lightweight confirmation that the capability is live, materially aligned to the current prescriptive model, and has no material gap requiring contracted remediation. For capabilities designated Remediate or Implement, the acceptance criteria below apply to the changed or newly implemented footprint.

Acceptance under this SOW does not reopen or reaccept unchanged Banner SaaS functionality outside the contracted Signature delta.

A capability is considered complete when it meets the following criteria:

- End-to-end workflows can be executed by designated users
- Required targeted data supports the changed workflows accurately and consistently
- Changed or newly adopted integrations and reporting function as part of the capability outcome
- The institution confirms readiness to operate the changed or newly adopted capability footprint in production

Acceptance is based on demonstrated operational use, not configuration completion. Acceptance confirms that the capability delivers the outcomes defined in Section 5 and can operate effectively within the institution's broader capability model.

Each capability must be validated before progressing to broader system validation.

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Acceptance may be granted only for in-scope business capabilities expressly identified in this Statement of Work. No product feature, illustrative workflow, deferred capability, or future-state functionality will be deemed accepted, delivered, or contractually included unless expressly included in scope or added through Change Control.

Capability acceptance represents the official confirmation that the capability is complete and accepted, and supersedes any prior validation performed during delivery execution.

10.2 Phase and Stage Acceptance Criteria

Progression through the delivery lifecycle is governed by stage gate reviews based on validated readiness, completion of defined delivery activities, and alignment between the parties.

Stage gate progression is informed by capability-level validation but does not require formal contractual acceptance of all capabilities. Formal acceptance remains governed exclusively by Section 10.1.

Each phase is considered complete when:

- All in-scope capabilities for the phase meet capability-level acceptance criteria and demonstrate integrated operation within end-to-end workflows where applicable
- Identified risks and issues are resolved or formally accepted
- The institution confirms readiness to progress to the next phase

Stage gate acceptance ensures that delivery advances based on readiness and validated outcomes, not timeline pressure.

10.3 Deliverable Acceptance Process

Deliverables produced during the engagement support capability delivery and validation but are not the primary measure of completion.

Deliverables include:

- Documented process flows and decision points
- Identified exceptions and required adjustments
- Defined reporting outputs and data structures
- Validation outputs confirming operational execution readiness

Deliverables support capability validation and are reviewed and approved by the institution, however, deliverable acceptance alone does not constitute capability acceptance unless all criteria defined in Section 10.1 are met.

Deliverables are provided to support capability execution and validation.

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The existence or completion of a deliverable does not imply inclusion of additional scope or services beyond those required for capability operational readiness.

10.4 Final Acceptance and Transition to Optimize

Final acceptance occurs when all in-scope capabilities have achieved capability-level acceptance and the institution demonstrates operational readiness.

This includes:

- Validation of end-to-end execution across the changed and impacted in-scope capabilities
- Confirmation that designated users can operate the new or materially changed delivered model
- Completion of required activities to support go-live readiness

Final acceptance marks the transition from delivery to sustained operation and optimization.

It is the point at which the institution assumes ownership of capability operation, supported by ongoing optimization activities.

Final acceptance represents the formal completion of all in-scope capabilities under this SOW and establishes the basis for transition to ongoing operation and support.

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11APPENDICES

11.1 Appendix A – Capability Definitions and Mapping

11.1.1 Detailed capability descriptions aligned to pillars

This appendix provides reference definitions for the Pillars and associated Operational Capabilities included in the Ellucian Student capability model.

The inclusion of a Pillar or Operational Capability in this appendix does not indicate that it is licensed by the Client or included in the contracted scope.

The purpose of this appendix is to:

- Establish a shared understanding of capability terminology and boundaries
- Describe the Operational Capabilities associated with each Pillar
- Identify representative institutional outcomes and cross-capability process relationships

Section 5 defines the controlling customer-specific delivery scope for this engagement. The descriptions in this appendix support interpretation and delivery planning but do not independently establish, expand, or modify contractual scope.

11.1.2 Capability Definition Framework

Each Pillar is described using the following structure:

- Capability Description – The institutional function or outcome represented by the Pillar
- Operational Capabilities – The subordinate activities and process areas associated with the Pillar
- Key Outcomes – Representative institutional outcomes enabled by the Pillar and its Operational Capabilities
- Process Alignment – Key dependencies and interactions with other Pillars and Operational Capabilities

Operational Capabilities and supporting descriptions in this appendix are reference material and are subordinate to the customer-specific delivery scope defined in Section 5.

11.1.3 Pillars and Capabilities

The following capability definitions align to the Ellucian Student Signature pillar model and provide a reference for delivery planning, sequencing, validation, and acceptance activities. These definitions describe the business and operational capabilities that support the institution's ability to operate within the Ellucian Student capability model.

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Section 2.3 defines the capability hierarchy and Section 5 defines the controlling customer-specific delivery scope for this engagement. The Operational Capabilities and supporting descriptions in this appendix are reference material used to clarify delivery context, process areas, dependencies, and expected outcomes. They do not independently establish or expand contractual scope.

11.1.3.1 Curriculum (General and Core) Capability Definitions

Capability Description
Curriculum (General and Core) enables the institution to establish and manage the foundational student system structures, academic framework, curriculum lifecycle, course information, and related administrative services required to operate the student environment.

Operational Capabilities:

- General and Core
- Veteran Student Services
- Student Transportation Services
- Curriculum Design
- Curriculum Change Management
- Course Management
- Academic Faculty Load Management

Key Outcomes

- Accurate and governed academic structures and curriculum definitions
- Consistent curriculum lifecycle management
- Reliable foundation for admissions, enrollment, advising, registration, student records, financial aid, and completion processes
- Improved operational visibility into foundational academic and administrative processes
- Reduced reliance on legacy process replication through adoption of the baseline capability model

Process Alignment
Curriculum (General and Core) provides the academic and administrative foundation upon which downstream student lifecycle capabilities depend. It supports alignment across Recruiting & Admissions, Student Aid, Student Success: AR, Student Success: Student Progression, reporting, integration, and institutional compliance processes.

11.1.3.2 Recruiting & Admissions Capability Definitions

Capability Description
Recruiting & Admissions enables the institution to identify, generate, engage, evaluate, and convert prospective students through structured lead generation, recruitment, application, and admissions decision processes.

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Operational Capabilities

- Student Application Management
- Student Admissions Decision Management
- Prospective Student Engagement
- Domestic Student Recruitment
- International Student Recruitment
- Lead Generation

Key Outcomes

- Clear visibility into prospective student engagement and recruitment pipeline activity
- Consistent application intake and admissions processing
- Timely and policy-aligned admissions decisions
- Improved coordination between recruitment, admissions, financial aid, enrollment readiness, and student onboarding
- Reduced operational fragmentation across historically separate recruitment and admissions processes
- Ability to generate, capture, qualify, and route prospective student leads into structured recruitment and admissions processes

Process Alignment
Recruiting & Admissions converts lead generation and prospective student engagement into structured applicant and admitted-student records. These outputs feed downstream capabilities, including Student Aid, Student Success: AR, Student Success: Student Progression, reporting, integration, and go-live readiness activities.

11.1.3.3 Student Aid Capability Definitions

Capability Description
Student Aid enables the institution to administer, process, package, disburse, communicate, and manage student financial aid and related funding support throughout the student lifecycle.

Operational Capabilities

- Student Financial Aid Administration
- Student Financial Aid Application Management
- Student Financial Aid Counseling
- Student Financial Aid Packaging and Disbursement
- Student Government Sponsored Aid Management

Key Outcomes

- Accurate and consistent administration of student financial aid processes
- Improved student visibility into aid status, required actions, and financial position

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- Timely and policy-aligned packaging, awarding, and disbursement of student aid
- Improved coordination between financial aid, admissions, enrollment, student accounts, and student progression
- Enhanced readiness to support regulatory, institutional, and student funding requirements

Process Alignment
Student Aid depends on applicant, student, enrollment, academic, and account information from upstream and parallel capabilities. It aligns closely with Recruiting & Admissions, Student Success: AR, Student Success: Student Progression, reporting, integration, and compliance processes.

11.1.3.4 Student Success: AR Capability Definitions

Capability Description
Student Success: AR enables the institution to manage student financial account activity, including tuition and fee processing, student receivables, student account administration, and related residential living account dependencies where included in scope.

Operational Capabilities

- Student Tuition and Fees Processing
- Student Accounts Receivable
- Student Accounts Administration
- Student Housing and Residential Living

Key Outcomes

- Accurate and consistent student tuition, fee, and account processing
- Improved visibility into student balances, receivables, payments, and account status
- Stronger coordination between student accounts, aid, enrollment, housing, and student lifecycle processes
- Improved operational control over student financial activity
- Greater student financial clarity and institutional financial visibility

Process Alignment
Student Success: AR operates as a bridge between student lifecycle activity and financial operations. It depends on enrollment, registration, housing, aid, and student record activity, and it provides account and receivables information needed for student support, reporting, reconciliation, and institutional financial visibility.

11.1.3.5 Student Success: Student Progression Capability Definitions

Capability Description
Student Success: Student Progression enables the institution to manage student onboarding, registration, academic planning, records, academic progress, advising,

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support services, conferral, completion, engagement, retention, and related lifecycle activities that support student persistence and completion.

Operational Capabilities

- Student Onboarding and Orientation
- Degree Declaration
- Student Registration
- Grading and Feedback
- Student Grades Management
- Conferral Eligibility Management
- Commencement Event Management
- Student Conferral Processing
- Co-Curricular Transcripts
- Student Academic Policy Management
- Student Records and Details Management
- Enrollment Status Management
- Academic Year Scheduling
- Teaching and Learning Compliance and Regulatory Reporting
- Student Conduct
- Academic Advising
- Field Placement/Externship Management
- Student Accessibility Services
- Student Wellbeing Services
- Athletic Student Services
- Veteran Student Services
- Student Academic Support Services
- International Student Services
- Student Engagement, Inclusion, and Leadership Development
- Student Engagement and Retention
- Student Transfer Articulation
- Credential Discovery

Key Outcomes

- Improved student onboarding, registration, academic planning, and lifecycle progression
- Accurate student records, grades, academic status, enrollment status, and completion data
- Stronger advising, support, engagement, retention, and intervention processes
- Consistent application of academic policies, progression requirements, and completion rules
- Improved visibility into student progress, risk, support needs, and completion readiness

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- Better coordination across admissions, aid, accounts, academic operations, advising, support services, reporting, and compliance activities
- Improved visibility into earned and near-complete credentials that may not otherwise be apparent through a student's declared academic pathway

Process Alignment
Student Success: Student Progression depends on the academic foundation established through Curriculum (General and Core), applicant and admit data from Recruiting & Admissions, funding and financial aid information from Student Aid, and student account activity from Student Success: AR. It provides the operating context for student lifecycle execution, advising, support, retention, records, completion, credential discovery, reporting, and downstream institutional outcomes. Credential Discovery specifically aligns with degree auditing, academic records, conferral, advising, reporting, and student communication processes.

11.1.3.6 Lifelong Learning Capability Definitions

Capability Description

Lifelong Learning enables the institution to support continuing education, workforce-aligned learning, skills development, personalized learning discovery, and flexible learning pathways for individuals seeking education and training beyond traditional degree-oriented programs.

Operational Capabilities

- Personalized Course Recommendations
- AI-Driven Career Path Suggestions
- Dynamic Learner Profiles
- AI-Powered Skills Mapping
- Connect Skills to Workforce Demand
- Workforce Education & Upskilling
- Flexible Pricing & Financial Models
- Course Catalog for Continuing Education

Key Outcomes

- Improved learner access to continuing education and workforce-aligned learning opportunities
- Greater visibility into how institutional learning offerings align to skills and workforce demand
- More personalized discovery of learning and career-development pathways
- Improved institutional ability to support workforce education, reskilling, and upskilling programs
- Flexible support for nontraditional learners, program models, and financial approaches

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- Stronger connection between curriculum, skills, workforce needs, and lifelong learner engagement

Process Alignment

Lifelong Learning aligns with Curriculum where learning offerings, course structures, and skills mappings are established; with Student Success where learner records, advising, progression, and credential-related activities intersect; and with Student Success: AR and Finance where pricing, payment, and financial processes apply. Delivery may also depend on reporting, integration, learner identity, communication, and workforce or skills data required to support the contracted Lifelong Learning capabilities.

12Appendix B – Roles and Responsibilities

12.1 Expanded role definitions for Ellucian and Client

This appendix provides expanded definitions of roles and responsibilities for both Ellucian and the institution.

The purpose is to:

- Establish clear ownership and accountability across all capabilities
- Define how roles contribute to delivery, validation, and adoption
- Ensure alignment to the capability-based delivery model

Roles are defined based on their contribution to operational outcomes, not system configuration or isolated activities. Responsibilities are described at a capability level rather than through task-level RACI structures to reflect the integrated delivery model.

12.2 Ellucian Roles

12.2.1 Project Manager

The Project Manager is responsible for overall delivery coordination and execution management.

Responsibilities include:

- Managing delivery progression across all capabilities and phases
- Coordinating activities aligned to the sequenced roadmap and stage gates
- Tracking risks, issues, and dependencies
- Facilitating decision-making and governance activities
- Ensuring alignment to scope, timelines, and delivery outcomes

The Project Manager ensures that delivery remains structured, controlled, and aligned to defined objectives.

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12.2.2 Capability Lead

The Capability Lead is responsible for end-to-end delivery of assigned capabilities.

Responsibilities include:

- Leading delivery of business capabilities and associated operational processes
- Defining and validating process flows, workflows, and execution models
- Guiding alignment to standard capability practices
- Supporting capability-level validation and acceptance
- Coordinating with supporting roles to ensure integrated delivery

The Capability Lead is accountable for ensuring that each capability is delivered as a complete operational outcome.

12.2.3 Solutions Architect

The Solutions Architect is responsible for overall solution alignment and integration across capabilities.

Responsibilities include:

- Ensuring alignment of processes, data, and integrations across capabilities
- Defining and validating cross-capability dependencies and interactions
- Supporting resolution of complex design and integration considerations
- Ensuring the solution supports end-to-end operational execution

The Solutions Architect ensures that delivery results in a cohesive and integrated operating model.

12.2.4 Technical / Build Resources

Technical and Build resources are responsible for configuration, data, and technical execution.

Responsibilities include:

- Supporting configuration aligned to defined capability requirements
- Executing targeted data alignment, configuration, transformation, and validation activities where required by the contracted Signature delta
- Supporting integration, configuration and validation
- Enabling workflows required for capability execution

These roles support delivery by ensuring that technical components enable operational outcomes.

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12.2.5 Testing and Validation Lead

The Testing Lead is responsible for ensuring capabilities meet operational readiness criteria.

Responsibilities include:

- Coordinating testing and validation activities across capabilities
- Ensuring validation aligns to capability-level acceptance criteria
- Confirming that workflows, data, and integrations function end-to-end
- Supporting readiness for stage gate progression and go-live

The Testing Lead ensures that delivery is validated based on execution and usability, not configuration completeness.

12.3 Client Roles

12.3.1 Executive Sponsor

The Executive Sponsor provides strategic oversight and executive alignment.

Responsibilities include:

- Providing direction on institutional priorities and outcomes
- Supporting decision-making and issue escalation
- Ensuring organizational alignment to the delivery model and objectives

The Executive Sponsor ensures that delivery remains aligned to institutional goals and commitments.

12.3.2 Program Lead

The Program Lead is responsible for overall coordination on the client side across all workstreams.

Responsibilities include:

- Coordinating institutional participation across all capabilities
- Managing internal dependencies, timelines, and readiness
- Supporting decision-making and validation activities
- Ensuring alignment to delivery expectations and outcomes

The Program Lead is the primary point of accountability for client-side execution.

12.3.3 Capability SMEs (Subject Matter Experts)

Capability SMEs are responsible for providing functional expertise and validation.

Responsibilities include:

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- Participating in process definition and validation activities including targeted data changes, reports, and integrations
- Providing input on institutional requirements and constraints
- Supporting alignment to standard capability practices
- Validating that delivered capabilities meet operational needs

SMEs are critical to ensuring that capabilities are accurate, relevant, and usable.

12.3.4 Project Manager (Client)

The Client Project Manager supports coordination and communication within the institution.

Responsibilities include:

- Managing internal activities and timelines
- Coordinating participation in delivery and validation activities
- Supporting communication across stakeholders and teams

This role ensures that the institution is prepared and aligned for delivery execution.

12.4 Delivery Pod Role Structure

Delivery is executed through a coordinated pod-based model aligned to capabilities.

The delivery pod is designed to:

- Support end-to-end capability delivery
- Reduce handoffs and improve execution continuity
- Align resources to outcomes rather than functions

A typical delivery pod includes:

- **Project Manager** – overall coordination and governance
- **Capability Leads** – ownership of specific capabilities
- **Solutions Architect** – cross-capability alignment
- **Technical / Build resources** – configuration, data, and integration execution
- **Testing Lead** – validation and readiness assurance
- **Change Management Lead** – optional organizational change and adoption support when separately contracted

This model ensures:

- Clear ownership of outcomes
- Integrated delivery across capabilities
- Consistency in execution and validation

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The delivery pod operates as a single, coordinated unit, responsible for delivering capabilities that are ready for operational use.

13Appendix C – Delivery Artifacts and Deliverables

13.1 Standard deliverables by phase and capability

13.1.1 Purpose of Delivery Artifacts

This appendix defines the standard artifacts and deliverables produced throughout the engagement.

The purpose is to:

- Provide clarity on what is produced to support capability delivery
- Ensure consistency in documentation, validation, and execution support
- Align artifacts to capability-based delivery and acceptance criteria

Artifacts are not standalone outputs. They exist to support delivery, validation, and operational readiness of each in-scope business capability.

For SaaS-to-Signature delivery, existing artifacts from the Client's Banner SaaS modernization or current operating environment will be reused or validated where fit for purpose. New artifacts are created only where required to support the contracted validation, remediation, or net-new Signature work.

13.1.2 Artifact Categories

Artifacts are grouped into the following categories:

- Process and Workflow Artifacts – define how capabilities operate
- Data and Reporting Artifacts – support targeted data changes, visibility, and accuracy
- Validation Artifacts – confirm readiness and execution
- Training and Enablement Artifacts – support operational use of new or materially changed capabilities

Each artifact type is produced within the context of business capability delivery.

13.1.3 Process and Workflow Artifacts

These artifacts define how each capability is executed.

Includes:

- Documented end-to-end process flows
- Defined decision points and process rules

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- Identification of exceptions and variations
- Workflow definitions supporting execution across roles

These artifacts ensure that capabilities are delivered as structured and repeatable processes.

13.1.4 Data and Reporting Artifacts

These artifacts ensure that capabilities are supported by accurate and usable data.

Includes:

- Defined targeted data requirements and mappings where required by the changed footprint
- Validation outputs for targeted data and configuration changes
- Reporting definitions aligned to operational needs
- Outputs supporting monitoring and decision-making

These artifacts ensure that data supports end-to-end capability execution.

13.1.5 Validation Artifacts

Validation artifacts confirm that capabilities meet acceptance criteria.

Includes:

- Outputs demonstrating end-to-end workflow execution
- Evidence of integration and data alignment
- Validation results confirming operational readiness
- Documentation supporting stage gate progression

These artifacts are used to support capability-level acceptance.

13.1.6 Training and Enablement Artifacts

These artifacts support transition of new or materially changed capabilities to operational use.

Includes:

- Guidance materials supporting execution of new or materially changed processes
- Targeted enablement aligned to changed capability workflows
- Outputs supporting readiness and transition for designated users of the changed footprint

These artifacts support effective use of the new or materially changed capabilities included in scope. Broader Organizational Change Management artifacts are produced only when the optional Change Management service is separately contracted.

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13.1.7 Alignment to Capability Delivery

All artifacts are produced as part of capability execution, not as independent deliverables.

Artifacts are considered complete when they:

- Support execution of end-to-end workflows
- Enable validation and acceptance activities
- Contribute to operational readiness

This ensures that deliverables are directly tied to capability outcomes, not treated as separate milestones.

13.1.8 Prebuilt Assets

Delivered content may include:

- Business Process Orchestrations
- Platform Extensions
- Data Orchestration Export Pipelines
- Reporting and Analytics Dashboards
- Reporting and Analytics Experience Cards
- Reporting and Analytics Reports (Unique Dashboard Reports)

13.2 Integration Responsibility Model

Integration ownership, delivery responsibility, and scope boundaries are defined in this section.

Core Principle:
Any integration not expressly assigned to Ellucian in this section is the responsibility of the Client.

Integration Type	Required for Capability Execution	Ellucian Responsibility	Client Responsibility	Notes
Productized Integration	Yes	Configure and validate	Adopt and test	Delivered as part of baseline solution
Contracted Integration (Ellucian-built)	Yes (if specified)	Build, configure, validate	Provide requirements, test	Must be explicitly listed in SOW
Client-Owned Integration	Varies	Advisory only (if stated)	Full ownership	Includes middleware, APIs, data flows
Partner Integration	Varies	None unless stated	Manage partner	Partner accountable for delivery

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Integration Type	Required for Capability Execution	Ellucian Responsibility	Client Responsibility	Notes
Custom Integration	No (default)	None	Full ownership	

Advisory Services

Where Ellucian provides advisory guidance, Ellucian is not responsible for design, build, execution, or ongoing operation of the integration.

Dependencies

The Client is responsible for ensuring all required systems, interfaces, and third-party components are available and functioning to support integration activities.

Change Control

Any integration not defined in this section requires a mutually approved Change Order prior to execution.

14Appendix D – Glossary of Terms

14.1 Purpose of the Glossary

This glossary provides definitions of key terms used throughout this Statement of Work.

The intent is to:

- Provide clear, consistent language for all stakeholders
- Support understanding of the capability-based delivery model
- Bridge terminology from traditional implementations to SaaS-based delivery

14.2 Key Terms

Pillar – A major operational domain within the Ellucian Student capability model and the governing contractual unit of scope and acceptance under this SOW. Each Pillar is delivered through one or more subordinate Operational Capabilities.

Capability – A capability describes what the institution is able to do operationally. It represents a combination of processes, data, and workflows that enable a specific function.

Operational Capability – An operational capability is a specific activity or process that supports execution of a broader business capability. Operational capabilities do not independently define contractual scope.

Capability-Based Delivery – A delivery approach where work is organized around complete operational outcomes.

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Prescriptive Delivery Model – A delivery approach based on standardized processes and practices.

Navigate to SaaS (N2S) – The delivery lifecycle used in this engagement including Discover, Build, Optimize.

Stage Gate – A defined checkpoint used to determine readiness to move forward.

Sequenced Roadmap – The planned order in which capabilities are delivered.

End-to-End Workflow – A complete process spanning all steps required to perform a function.

Operational Readiness – The point at which a capability can be used in a live environment.

Adoption – The successful use of delivered capabilities by the institution.

Validation – The process of confirming that a capability works as intended.

Capability Acceptance – Formal confirmation that a capability is complete.

Change Control – The formal process to evaluate and approve changes.

Integration – The connection between systems or processes.

Go-Live Readiness – The point at which the institution is ready to operate.

Time to Value – The time required to begin realizing operational benefits.

Mods Studio Scan – an Ellucian tool used in the pre-sales assessment of the Client's existing Banner SaaS environment, completed before execution of this SOW, to identify material deviations from Ellucian's current prescriptive configurations, extensions, and implementation patterns that may require remediation as part of this engagement.

SaaS-to-Signature Delivery Status - The contracted classification applied to an in-scope capability: Validate, Remediate, or Implement.

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Ellucian

The Ellucian ILT bundle is a service subscription that includes a specific number of seats to Ellucian virtual instructor-led public classes.

Offering	**Instructor Led Training ("ILT")** [1,2]			
Includes	Banner SaaS Pass (30 Seats) • Experience Fundamentals for Administrators • Experience for Developers: Using Extensions to Create Cards • Ethos Integration Fundamentals for Administrators • Ethos Integration Fundamentals for Developers • Data Connect Integration Fundamentals for Developers	Colleague SaaS Pass (29 Seats) • Colleague System Administration Fundamentals for Saas • Rule Writing Techniques Training • Colleague Studio Computed Columns • Colleague Studio Programming Fundamentals for Saas • SQL Query Fundamentals • Colleague Reporting Research Fundamentals • Performing Routine Maintenance • Colleague Saved List Fundamentals • Colleague Studio Programming Debugging • Ethos Integration Fundamentals for Administrators • Ethos Integration Fundamentals for Developers • Experience Fundamentals for Administrators • Experience for Developers: Using Extensions to Create Cards • Data Connect Integrations Fundamentals for Developers • Evisions Process Handler	Colleague Simplify SaaS Pass (16 Seats) • Colleague System Administration Fundamentals for Saas • Rule Writing Techniques Training • SQL Query Fundamentals • Colleague Reporting Research Fundamentals • Performing Routine Maintenance • Colleague Saved List Fundamentals • Ethos Integration Fundamentals for Administrators • Ethos Integration Fundamentals for Developers • Experience Fundamentals for Administrators • Experience for Developers: Using Extensions to Create Cards • Data Connect Integrations Fundamentals for Developers • Evisions Process Handler Colleague Programmer Pass (7 Seats) • Colleague Studio Computed Columns • Colleague Studio Programming Fundamentals for Saas • Ethos Integration Fundamentals for Developers • Experience for Developers: Using Extensions to Create Cards • Data Connect Integration Fundamentals for Developers	Colleague Access Pass (70 Seats) • Colleague Degree Audit • Colleague HR 1095-C Work File Generation and Maintenance • Colleague Reporting Research Fundamentals • Colleague Saved List Fundamentals • Colleague Studio Computed Columns • Colleague Studio Debugging • Colleague Studio Programming for SaaS • Colleague Studio Programming Fundamentals • Colleague System Administration Fundamentals • Colleague System Administration Fundamentals for SaaS • Colleague W-2 Year End Processing • Envision Process Handler Fundamentals • Microsoft SQL Query Fundamentals • Performing Routine Maintenance • Rule Writing Techniques • Experience Fundamentals for Administrators • Experience for Developers: Using Extensions to Create Cards • Workflow Fundamentals for Designers and System Administrators • Ethos Integration Fundamentals for Administrators • Ethos Integration Fundamentals for Developers • Data Connect Integration Fundamentals for Developers
Pricing Metrics	Fixed Fee Service			

Notes

[1] Instructor Led Training services must be used within 24 months of the Beginning Date applicable to the ERP Cloud Software identified in an Order Form.

[2] Clients may assign seats to courses on the current Ellucian ILT schedule that are listed as part of their Pass bundle. Seats can be dispersed in any way the customer desires, as long as Client uses the number of seats available in their bundle for the Pass identified in an Order Form.

† As specified/described in an Order Form

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