Action Item 4.7

Topic: **Contract Approval – Professional Services**

Strategic Direction: **Access and Inclusion Objective: Simplify and shorten the registration-to-credential process for students and community members.**

Presented By: **Dr. David Hellmich and Kathy Dirks**

Presentation:
        DegreeWorks is a web-based tool that allows students and advisors to track academic progress toward graduation. It helps students identify which requirements have been satisfied and which ones are still outstanding, and it allows them to perform "what-if" analyses to see how their current coursework would be used in a different major. This tool is helpful for ensuring that students are on track to graduate and for making informed decisions about their course of study.
        The implementation of DegreeWorks will be facilitated by SIG (Strata Information Group) with the coordination of SVCC staff for a total contract amount of $125,800. Illinois Public Community College Act (110 ILCS 805) and SVCC Board Purchasing Policy (305.01) exempt contracts for the purchase of software from public bid/solicitation requirements. SVCC has a long-standing relationship with SIG and has successfully completed numerous projects with this partner.

Recommendation:
        The administration recommends the Board approve the professional services contract for the implementation of and training for DegreeWorks for $125,800 to be paid from restricted use bond proceeds.

Proposal for Services
Strata Information Group
April 26, 2022

General Information:

Client Name:	Sauk Valley Community College
Client Representative:	Kathy Dirks <kathleen.m.dirks@svcc.edu> Dave Habben <dave.habben@svcc.edu>
SIG Representative:	Allison Leonard <allison@sigcorp.com>
Project Name:	Degree Works™ Implementation & Consulting Support
Other Contractual Information:	N/A
Description of Work:	SIG will provide Degree Works™ consulting services to assist with the installation, configuration, functional and technical training, scribing, project management and other related Degree Works™ project requirements as indicated below. All services will be completed remotely.
SIG Project Code:	*Not yet requested*

Proposed Services:

Tasks:	Hours
1. Project Planning, Preparation and Management	60
2. Database/Single-Sign-On Services	100
3. Degree Works™ Technical Consulting	60
4. Degree Works™ Functional Consulting	180
5. Degree Works™ Student Educational Planner (SEP) Consulting	80
6. Degree Works™ Course Program of Study (CPoS)	80
7. Degree Works™ Scribing Services	180
Total Hours:	**740**

Summary of Estimated Costs:

Item	Rate	Amount	Cost
Hours	$170	740	$125,800
Travel Expenses	$1,800	0	$0
Total Cost Range:			**$125,800**

Notes:
- SIG will invoice only for the consulting hours provided and incurred.
- The hours estimate includes project management, preparation time, and remote labor, and the development of trip reports.
- Approximate hours and costs are based on the estimated tasks to complete this project as described in the attached "General Description of Services." This may vary based on the assumptions listed and changes in the Client's needs.
- Costs exclude all state taxes, if applicable.

General Description of Work:

1. **Degree Works™ project planning, preparation, and management**
   - Remote project planning and software demonstration which includes development of implementation timeline, discussions of stakeholder responsibilities, and product and project overview.
   - SIG project managers coordinate professional services for the duration of the project to completion.
   - Project Manager facilitates remote completion of milestone tasks according to recommended best practices and provides ad-hoc consulting and subject matter expertise in support of project team.
   - Conduct regular conference calls with the Implementation Team and Project Manager.
   - Provide monthly budget status.

2. **DBA/SSO services**
   - Technical planning call.
   - Confirm server readiness and apply outstanding system pre-requisites and third-party tools.
   - Install DW 5.X (latest available release at the time the work commences) in a TEST environment which meets Ellucian-supported standards.
   - Clone DWTEST to DWPROD upon completion of implementation tasks.
   - DWTEST/DWPROD SAML 2.0 configuration and documentation
   - Estimate assumes SVCC procures and stages vendor-compliant servers, databases, licenses, and third-party tools prior to SIG commencing installation.

3. **Degree Works™ Technical Consulting**

   - Provide support for single-sign-on configuration
   - Technical training includes three days of remote via Zoom training for SVCC technical staff who will be maintaining the Degree Works™ system
   - Complete one-time modifications/localizations for the Responsive Dashboard
     This training includes overviews of the data extract, software architecture, continuing software maintenance, user access, security roles, and reporting.

4. **Degree Works™ Functional Consulting**

   4a. Degree Works™ Foundational Training

   - Kickoff and configuration training and demonstration includes three days remote via Zoom training.
   - General overview of Degree Works™ for campus stakeholders, review timelines and project responsibilities, introduce Degree Works™ components and begin site-configuration
   - Demonstration of Degree Works™ components, usage, and benefits to the campus community

   4b. Degree Works™ Scribe Training

   - Introduction to Scribe includes three days of remote via Zoom training for SVCC scribers.

   4c. Degree Works™ Functional consulting to include Web Training, preparation, and follow-up

   - Web functionality training includes three days remote via Zoom training to introduce Degree Works™ web services to campus end-users.

   4d. Degree Works™ Functional consulting to include Go-Live support, training, preparation, and follow-up

   - Project go-live training and support includes three days remote via Zoom training/planning as the Degree Works™ project goes-live. Services can include functional and technical support, general

consulting, and additional training. Agenda is developed in consultation with SVCC prior to the visit with duration and content tailored to SVCC's needs.

5. **Student Educational Planner (SEP) consulting:**

- SIG provides planning and general consulting to include preparation of training materials, as well as testing, documentation, and troubleshooting.
- Remote configuration of UCX tables and system settings in TEST account prior to SEP template creation, training, and testing.
- SIG will train implementation team on SEP baseline usage, maintenance, and template creation.
- SIG encodes sample SEP program templates for training purposes using source materials provided by SVCC.
- SVCC is responsible for the comprehensive review, testing, validation, and discretionary adjustments of all delivered templates.

5a. Template development

- Completion of SVCC SEP program templates from source material provided by SVCC for one catalog year.

- Complete discretionary adjustments to delivered blocks.

6. **Degree Works Course Program of Study (CPoS) Implementation**

Assumptions and Prerequisites

- SIG will assist with setting up test case scenarios; the Client is responsible for completing all test cases for troubleshooting purposes
- If extensive scribe revisions are required, SIG will assist as hours allow, the Client is responsible for remainder of scribe work
- Ultimately, the Client is responsible to ensure system firewalls permit Degree Works and Banner communication for the required API
- The Client must be on the required software versions noted below

CPoS Functional Consulting, Preparation and Configuration

- Project management, preparation, and follow-up to include access/connectivity, planning calls, resource scheduling, project briefings, agendas travel preparation, trip reports and project documents
- Webinar to discuss CPoS software pre-requisites, resource needs, and minimal anticipated level of effort
- Degree Works and Financial Aid consultants work remotely to set up individual test cases.
- Banner Student baseline forms consulting - test environment
- Banner Degree Works & Financial Aid consultants baseline forms consulting, testing and troubleshooting - test environment

- Provide analysis, guidance, documentation and Scribe prototypes which clients may use to complete required Scribe block adjustments to Credits header qualifiers
- Address client Scribe questions during scribing and testing

CPoS Technical Consulting/DBA Support

- Complete Degree Works style sheet modifications to the Student View to accommodate Elective Credits Allowed (ECA) computations
- Ad-hoc technical consulting to assist in accurately identifying specific course requirements similar to rules programmed for SAP.
- Ad hoc technical consulting to address questions regarding required Ellucian components, Degree Works style sheet adjustments
- Review technical guidelines with client concerning software pre-requisites
- Assist in set-up of API integration between Degree Works and Banner on Test environment per Ellucian installation recommendations.
- Ad-hoc consulting in support of the Degree Works what-if API
- Install production environment

7. **Degree Works™ Baseline/Historic Catalog Scribing:**
   - SIG to provide scribing services for **one (1)** catalog of undergraduate programs.
   - SIG to install completed blocks on the Degree Works™ TEST server prior to training.
   - SIG to conduct periodic reviews of Scribe blocks and Scribe status calls to confirm appropriate Scribe methodologies.
   - Estimate includes a catalog authentication webinar for SVCC staff hosted by SIG personnel.
   - Estimate provides for up to **180 hours** of Scribe services and is based on a review of SVCC's **2020-21** catalog.
     - SVCC's programs may require fewer or greater hours depending upon the complexity of requirements and institutional changes, policies and preferences.
     - If additional Scribing services are desired beyond those quoted, SVCC may contract with SIG for additional service hours at the rate quoted.
   - SIG utilizes standard Scribing best practices; institutions opting for different Scribe methodologies may require additional service hours.
   - Estimation of hours assumes SVCC submits a set of vetted, authenticated requirements in a single Excel, Word, or printed format for SIG use in advance of scribing.
   - SVCC is responsible for the comprehensive review of all blocks and for testing and validation.
   - Scribing of subsequent catalogs will be **80 hours** each.

Estimate assumes Sauk Valley Community College provides the following:

- Dedicated meeting room(s) and/or work space with audio-visual equipment to facilitate remote and consulting engagements.

- Deployment of the supported hardware, operating system, licenses, and Oracle database as specified by Ellucian.
- Secure remote access to all required systems, software tools, or applications as required with the most current data available for SIG staff access.
- Secure remote access for SIG consultants including:
  - o VPN and network access
  - o Password for baninst1 to the TEST system
  - o URLs for Banner® INB
  - o Other software or access requirements, as needed
- One designated point of contact responsible for project leadership and for coordinating plans, logistical needs, and the participation of all needed Sauk Valley Community College staff during scheduled timeframes.
- Advise SIG of academic calendar conflicts, vacations, holidays, hardware maintenance, planned power outages, or other scheduled activities that would impact the project plan.
- Services listed are for Degree Works™ baseline implementation only and do not include DWTE, SSO services, financial aid, Banner® or other consulting services not specifically noted.
- Hours shown are estimates for services based on SIG's experience with numerous institutions; actual hours may vary based on Sauk Valley Community College needs, software or network trouble-shooting requirements, resources and policies, and other factors.
- Sauk Valley Community College staff will carefully review Ellucian documentation and will configure their accounts to enable new or enhanced features or functionality, including adjustments to UCX tables, SEP, Shepentry, Scribe blocks, or other settings.
- Sauk Valley Community College staff will thoroughly test the DWTEST account to validate that functionality complies with Sauk Valley Community College objectives prior to SIG's preparation of the Production environment.

Administration Section:

BILLING INFORMATION	
Name:	
Title:	
Email Address:	
Phone Number:	
Other Notes:	

DOCUSIGN INSTRUCTIONS	
Can DocuSign be utilized?	☒ Yes ☐ No
If DocuSign cannot be used, how will document be sent to client?	
WHO WILL ACTUALLY SIGN THE DOCUMENT	
Name/email: **or check if SIG only:** ☐	
Title of person who will sign:	
WHO WILL ACTUALLY RECEIVE DOCUSIGN EMAIL	
Name/email of who will receive email if different from above	
WHO WILL NEED TO BE "CC-ed"	
Additional cc(s)/email(s)	
Note/Special Instructions:	