



EAB Global, Inc.
 2445 M Street NW
 Washington, DC 20037

Program Order Form

Organization: New Mexico State University
 Attn: Erika Martinez
 1780 E University Ave
 Las Cruces, NM 88003-8001

Date: 10/27/2022

Program and Program Fees:

Organization will have access to the Program services set forth below (the "Services"), which are as described in greater detail in each applicable Program Scope available here:

Navigate - <https://scopes.eab.com/navigate>

During the Program Term, the Services will be delivered in all material respects as described in each applicable Program Scope.

Program(s) Term: June 30, 2023 - June 29, 2024	Quantity	Fees
Navigate - 2 Year	10,500 Students	\$ 173,305.00
Academic Planning (2 Year)		
Academic Planning Registration		
Intelligence (2 Year)		
Milestone Guidance (2 Year)		
Student Success Collaborative (SSC) - Strategic Care		
Administrative & Travel Fee		\$ 3,750.00
Total		\$ 177,055.00

Program(s) Term: June 30, 2024 - June 29, 2025	Quantity	Fees
Navigate - 2 Year	10,500 Students	\$ 183,396.00
Academic Planning (2 Year)		
Academic Planning Registration		
Intelligence (2 Year)		
Milestone Guidance (2 Year)		
Student Success Collaborative (SSC) - Strategic Care		
Administrative & Travel Fee		\$ 3,750.00
Total		\$ 187,146.00

Program(s) Term: June 30, 2025 - June 29, 2026	Quantity	Fees
Navigate - 2 Year	10,500 Students	\$ 194,131.27

Academic Planning (2 Year)		
Academic Planning Registration		
Intelligence (2 Year)		
Milestone Guidance (2 Year)		
Student Success Collaborative (SSC) - Strategic Care		
Administrative & Travel Fee	\$	3,750.00
Total	\$	197,881.27

The fees offered in this Program Order Form are based on the Program(s) above and any other existing Programs you may have purchased from us. In the event you terminate or discontinue any Program, including any Program in this Program Order Form, prior to the expiration of its Program Term, the Fees may be subject to increase. Any Fees, unless denoted as one-time, reflect the annual price for each year of the Program Term or any portion thereof (each, a "Year").

This Program Order Form is made pursuant to the Master Agreement dated as of June 21, 2019, which along with the applicable scopes of services for the Program, that are incorporated herein by reference, form the entire agreement between the parties with respect to the Programs (and together with any other applicable agreements or supplements, the "Agreement").

Invoicing:

Services will commence at the designated Start Date of the Program Term. EAB will invoice Organization in advance of Services and payment is due within 30 days of the invoice date. Any One-Time Fees will be invoiced at 100% with The Program Fees on the initial invoice of each Year of this agreement as outlined below.

All Program Fees for the first Year will be billed and due within 30 days of the signature of this Agreement or Start Date, whichever is later. In subsequent years, All Program Fees will be billed and due on or before the start of each Year.

Each party represents and warrants to the other that the individual signing below on its behalf is authorized to enter into this Agreement and bind such party. The parties agree and acknowledge that any purchase order or other document subsequently provided by Organization with respect to the Program(s) above that contain additional, conflicting, or different term and condition or otherwise would amend, modify, or supplement this Agreement are unenforceable and shall be deemed null and void.

Please sign this Program Order Form and return it to Taylor Laudino tlaudino@eab.com to initiate your participation in the Program(s) **no later than 11/25/2022**(after which fees and terms set forth above are subject to change).

EAB Global, Inc.:

Signature: *Alyssa M. Franklin*
Name: Alyssa Franklin
Title: Executive Director
Date: 10/27/2022

New Mexico State University:

Signature: *Lauren Stuart*
Lauren Stuart (Apr 21, 2023 07:44 CDT)
Name: Lauren Stuart
Title: AVP Finance & Business Services
Date: Apr 21, 2023

Program Scope—Navigate

Below is a comprehensive description of all the services comprising EAB’s Navigate program (the “Program”). Your Program Order Form sets forth those specific services to which you have subscribed which may include some or all these services.

A. Scope of Services Overview

Navigate provides colleges and universities with access to a comprehensive student success management technology platform (“Navigate”), best practice research and networking, change management, and implementation support, including technical support. The major categories of service provided to subscribing organizations of Navigate (here, the “Program”) are described below, and are included in the Program’s services provided to Organization to the extent detailed in the Program Order Form, some of which may change over time based on feedback from subscribing organizations.

B. Navigate Program Summary

Overview of Navigate

The functionality included in Organization’s Navigate configuration – Core Platform, Historical and Predictive Analytics, and Smart Guidance – are described in more detail below.

- **Core Platform** – is comprised of comprehensive case management, communication, workflow capabilities and analytics in a secure and cloud-based format that links staff, faculty, advisors, and students in a connected and coordinated network, to improve targeted support and proactive care. Additionally, the Core Platform provides curated guidance and onboarding tools directly to students. Capabilities include, but are not limited to:
 - Smart Student Profile
 - Advanced Search
 - Campaign Management
 - Coordinated Care Network
 - Population Health Analytics
 - Effectiveness Analytics
 - Strategic Care Analytics
 - Appointment Scheduling
 - Student Success Network
 - Campus Resources
 - View Class Schedule
- **Strategic Care** – The Strategic Care module is comprised of comprehensive case management, communication and workflow capabilities. It includes secure, cloud-based tools that link staff, faculty, advisors and students in a connected and coordinated network, ensuring targeted support and proactive care. Key capabilities include, but are not limited to:

- Smart Student Profile
- Advanced Search
- Campaign Management
- Appointment Scheduling
- Multi-Modal Student Communications
- Coordinated Care Network
- Strategic Care Analytics
- **Prospect Management** - purpose-built for community colleges that seek cost-effective efficiencies in managing the student lifecycle – before and after enrollment. Prospect Management provides schools with a targeted prospect and student management system to help maximize enrollment and success efforts, through capabilities such as:
 - Import lists of prospective students from events and other recruitment channels
 - Deploy email campaigns with automated nudging and results tracking
 - Capture and preserve detailed information on the prospective student profile, such as:
 - Actions taken by prospective student
 - Notes from Authorized Users
 - Applications and status
 - Direct email communication
 - Create and templating online applications
 - Create web-to-lead templates, leading to profile creation
- **Historical and Predictive Analytics (Undergraduate Students Only)** – comprised of a comprehensive suite of secure, cloud-based data analytics which help administrators and leaders proactively assess, understand, and manage student success. Capabilities include, but are not limited to:
 - Student Success Predictive Model
 - Historical Trend Analysis (currently unavailable for students in two-year programs)
- **Smart Guidance** – Smart Guidance, which includes the Milestone Guidance and Academic Planning modules, provides curated guidance, planning and onboarding tools directly to students, via mobile and web applications, so they can make informed decisions and complete critical tasks at the most pivotal moments in the higher education journey. The capabilities of the two modules include, but are not limited to:
 - **Milestone Guidance**
 - Student Milestone Analytics
 - Student Milestone Integrations
 - Pivotal Moments Path
 - Student Surveys
 - Student Holds
 - Study Buddies
 - Care Unit Communication
 - Virtual Communities will be included only to the extent the Program Order Form includes Wisr Enrolled Students

– **Academic Planning**

- Academic Planning Analytics
- Academic Plan Integrations
- Digital Templates and Academic Planner
- Shared Workspace
- Best-Fit Scheduling
- One-Click Registration will be included only to the extent the Program Order Form includes Academic Planning Registration
- Degree Rules Integration will be included only as applicable.

C. Learning Management System Integration

- EAB will retrieve LMS data elements through an automated file extraction to feed into the Navigate Student Profile and Advanced Search features
- LMS data elements include Login Data (last login to LMS, last activity with a course) and Assignment Data (course name, assignment name, due date, points received/available, assignment type, assignment status)
- Using this data, partners will be able to:
 - View student’s LMS activity data to prompt deeper course engagement if necessary
 - Use relevant LMS data within the Advanced Search to run intervention campaigns
 - Display faculty insights directly in Navigate without requiring duplicative efforts or staff to view information across platforms

D. Best Practice Sharing and Organization Networking

The Program will also include access to services fostering networking across the cohort and sharing knowledge of how subscribing organizations are leveraging the Program to drive increased student retention, degree completion, and graduation success, including:

- Case studies profiling practice successes
- Research briefs on best practices
- User group conference calls
- Organization Networking Summit
- Insights from Organization national dataset

E. Implementation, Change Management, and Ongoing Support

To address Organization’s strategic priorities of promoting student success and retention, EAB has crafted a service model to support change management at the outset of, and improve outcomes across, the Program Term. This service model combines an in-depth partnership between EAB’s service team and Organization to prepare the institution for effective platform adoption and ongoing utilization as follows.

- **EAB’s Service Team:** Organization will have access to the following EAB staff resources who are available as outlined during and after implementation to partner with and support Organization staff:
 - Strategic Leader: Serves as primary contact and partner to Organization’s leadership team, responsible for understanding institutional goals and priorities. Following implementation, they will

provide guidance and support to expand utilization and drive more strategic use of the platform to further Organization's student success goals.

- Launch Consultant: Works with the Strategic Leader during implementation to set expectations, make recommendations, and support the roll-out strategy.
- Technical Project Manager: Manages technical aspects of the implementation process in coordination with Organization's technical team and administrators.
- Technical Support Team: Following platform launch, responsible for managing data or technical issues identified by Organization's application administrators. The team will partner with Organization's engineers and business analysts to resolve issues.
- **Onsite Working Sessions:** During the first twelve months of the Program Term, EAB staff will travel to an Organization institution for up to two (2) one-day working sessions with Organization staff to support the platform launch. In each Year of the Program Term after Year 1, EAB staff will travel to an Organization institution for up to one (1) one-day working sessions with Organization staff to provide ongoing strategic support.
- **Leadership Check-In Calls:** During the first twelve months of the Program Term, EAB staff will schedule monthly (or more frequent as determined by EAB staff during key phases of implementation) leadership check-in calls to discuss progress on implementation and confirm next steps. Following implementation, EAB staff are available for check-in calls with leadership teams monthly and with executive sponsors quarterly.
- **On Demand Phone and Email Support:** EAB staff are also available to provide additional support via email and phone outside of scheduled leadership calls and onsite. The typical response time is two (2) business days; however, full resolution or response may take longer depending on the request and EAB staff may request to resolve through a forthcoming scheduled call.

The following are some examples of the support EAB's Service Team can provide through the check-in calls and onsite working sessions.

- **Project Planning:**
 - Develop and monitor project plans for the implementation of the platform
 - Provide recommendations to support implementation and ongoing value delivery
 - Develop an annual service plan in partnership with Organization
 - Identify areas of opportunity to best leverage the technology
 - Identify how EAB's technology fits within Organization's existing technology ecosystem
 - Partner with Organization in determining next phase roll-out strategy
- **Platform Configuration Support:**
 - Support configuration and implementation decisions
 - Partner on campaign calendar creation
 - Recommend configuration and content changes
 - Continue workflow best practice discussions
- **Training and Engagement:**
 - Develop action plan and/or facilitate sessions to enfranchise key leaders, stakeholders, and end-users
 - Assist with creation of promotion and communication plans
 - Facilitate a "Train the Trainer" workshop and refresher sessions (either virtually or in person)
 - Walkthrough student success toolkits
 - Delve into analytics with select academic leaders

- Provide training and orientation on the resources available to your team including:
 - Self-service training resources
 - Release documentation and videos
 - Online training materials

F. Organization Responsibilities:

Organization agrees to:

- Identify and maintain a staff member to serve in the following roles in the first 30 days of the Program Term:
 - Executive Sponsor – Senior executive or Cabinet member responsible for outlining institutional student success and EAB partnership goals; provides direction and support as needed to realize goals
 - Program Sponsor – Senior leader or executive responsible for setting goals and expectations for platform utilization and student success initiatives with key stakeholders on campus; provides project oversight and direction to ensure continued progress and project success (may be same as Executive Sponsor)
 - Program Owner – Provides day-to-day project leadership and manages activities and progress of the leadership and build/engagement teams on an ongoing basis. Engages key stakeholder groups on campus as appropriate.
 - Technical Lead – Works with EAB to coordinate initial configuration, data extraction, data transfer through the implementation process (as outlined below) and directs team as it relates to ongoing maintenance.
 - Application Administrator – Manages and owns all ongoing platform configurations, user access, and end-user support needs; leverages EAB documentation, training materials, and self-service resources as appropriate
 - Internal Trainer(s) – Participates in “Train the Trainer” workshop led by EAB; owns ongoing training of end-users on campus; leverages EAB documentation, training materials, and self-service resources as appropriate (minimum of one person, may be Application Administrator)
- Schedule and hold a “Kickoff” call with the Executive Sponsor, Program Sponsor, Technical Lead, and EAB’s Strategic Leader within the first 30 days of the Program Term to discuss implementation plan
- Schedule and hold semiannual executive update calls with Executive Sponsor and Program Sponsor in each Year after Year 1 to discuss updates to institutional student success goals, project progress, and plan for the next six months
- Develop an annual service plan in collaboration with EAB’s Service team
- Complete an annual assessment to determine Organization status on EAB’s “Transformation Track Maturity Curve”
- Ensure assigned staff participate in the following:
 - Program Sponsor: check-in calls with EAB Strategic Leader up to once a calendar quarter
 - Program Owner: check-in calls with EAB Strategic Leader up to once a month
 - Application Administrator: check-in calls with EAB Strategic Leader and Program Owner up to once a month
- Send at least one (1) staff member to the Program’s student success meeting, “CONNECTED” as travel funding and schedule allows each conference
- Provide ongoing feedback on the platform to help EAB drive ongoing product development and innovation, including but not limited to usability, functionality, bug reports, and test results

- Partner with EAB to develop and execute strategies to drive adoption (i.e., download product) and ongoing utilization of Student Pathways among students

G. Data and Technical Requirements:

- Organization is responsible for transmitting a valid set of data files to the EAB secure data center. Both historical (up to 10 years) as well as current data are required. Data from the following system(s) are expected to be extracted and transmitted:
 - Student Information System (“SIS”)
- Organization will coordinate with EAB to ensure that the application data is reliable and valid. EAB will provide test cases for Organization to validate against their SIS. In addition to data from the above systems and other systems mutually agreed upon as relevant, Organization shall collaborate with EAB to configure application content, including, but not limited to, student tasks and events, intervention triggers, and interventions and support resources, both online and on-campus.
- The Program’s predictive models can ingest any data variables that meet the below requirements. For the EAB data science team to partner with Organization on integrating custom data fields into their predictive model, Organization is responsible for and must do the following:
 - Confirm the completeness and validation of the data requirements before sending to EAB
 - Provide the data in the required format (as explained in EAB’s technical documentation) for both historical and active student population
- Organization agrees to complete the following requirements by the specified dates or milestones:
 - Provide comprehensive and valid data files to EAB within ten (10) weeks of the start of the Program Term
 - Share Single Sign On protocol to establish secure identity management between systems within the first six weeks of the start of the Program Term
 - Automate nightly feeds by the end of the technical implementation

H. System Conversions and Material Upgrades

Program fees are based upon Organization’s current SIS configuration. For any system conversions and/or material upgrades which impact integration points such as web-service APIs that require reprocessing, remapping and revalidation of data will require a one-time re implementation fee based on the source system impacted included in the table below. In addition, Organization agrees to notify EAB in writing at least six (6) months in advance of any system conversions and/or material upgrades which require reprocessing, remapping and revalidation of data. A signed addendum agreed by both parties must be completed prior to starting the re-implementation. EAB is not responsible for any impacts on or delays to the Program due to any system modifications.

Organization System	One-Time Fee
SIS	40% of one-time implementation fee
Degree Audit	25% of one-time implementation fee

I. Authorized Users

EAB will provide access to a number of authorized users, designated by Organization, which is equal to the total number of academic advisors, other student services staff and administrators with oversight for

the campus(es) that are covered by the Program. In addition, EAB will provide access to an agreed upon number of student users as set forth in the configuration section in the Program Order Form.

J. Data Integration Services (Optional Implementation Service)

EAB Data Integration Services are a set of highly recommended, yet optional delivery services provided to generate necessary data from the SIS to populate Navigate during implementation. EAB offers these optional Data Integration Services free of charge for the first twelve months of the Program Term. This service is available for following source systems: Banner, Peoplesoft, Colleague (SQL), Jenzabar CX, and Jenzabar EX. If you have a relational-based source system that is not on this list EAB will conduct a feasibility assessment to determine if EAB can provide Data Integration Services for those systems.

- **Implementation Support** - If applicable and feasible following the feasibility assessment, in providing the EAB Data Integration Services, EAB shall do the following, where possible in the first twelve months of the Program Term:
 - Outline source data fields required for implementation of Navigate in consultation with EAB staff and Organization subject matter experts
 - Create SQL queries to extract data or code in the Query Environment specified above to output data files for implementation of Navigate
 - Develop query logic and/or code to generate regular updates of the output data files on a frequency needed by Navigate
 - Work with Organization’s staff to integrate the Data Integration Services queries or code into the production environment
- **Institution Support Requirements** - If applicable and feasible following the feasibility assessment, EAB is pleased to provide Organization with the Data Integration Services at no additional cost for the first twelve months of the Program Term. Shortly after enrolling in the Program, Organization and an assigned team of EAB employees will participate in a “Technical Planning Call” to discuss project implementation and utilization of the Data Integration Services and will provide a project implementation plan. Organization is required to provide access to the applications named above within two (2) weeks of the Technical Planning Call. In the event Organization does not provide access to the required applications within two weeks, EAB may assess a one-time fee of up to \$15,000 per source system for the Data Integration Services pursuant to a written addendum.
- **Data Access Permissions** - Organization will coordinate the delivery to EAB of all confidentiality agreements, data use agreements, or similar agreements required by Organization’s SIS vendor to permit EAB access to interact with Organization’s SIS and deliver appropriate data feeds to Navigate. All such documentation shall be delivered to EAB one week after the Technical Planning Call.






800715611 - EAB Global Inc FY24-FY26 - DACC.pdf

Final Audit Report

2023-04-21

Created:	2023-04-18
By:	Contracts NMSU (contracts@nmsu.edu)
Status:	Signed
Transaction ID:	CBJCHBCAABAAwJEYDqp_R7Z6cuHRwNEIPaf7TFccnOyy

"800715611 - EAB Global Inc FY24-FY26 - DACC.pdf" History

-  Document created by Contracts NMSU (contracts@nmsu.edu)
2023-04-18 - 3:38:45 PM GMT- IP address: 199.188.157.82
-  Document emailed to Lauren Stuart (dstuart@nmsu.edu) for signature
2023-04-18 - 3:39:47 PM GMT
-  Email viewed by Lauren Stuart (dstuart@nmsu.edu)
2023-04-19 - 3:28:03 AM GMT- IP address: 104.28.48.218
-  Document e-signed by Lauren Stuart (dstuart@nmsu.edu)
Signature Date: 2023-04-21 - 12:44:19 PM GMT - Time Source: server- IP address: 70.125.250.70
-  Agreement completed.
2023-04-21 - 12:44:19 PM GMT

Names and email addresses are entered into the Acrobat Sign service by Acrobat Sign users and are unverified unless otherwise noted.