Scope of Services: Financial Aid Optimization Services

Undergraduate Enrollment Services

EAB will provide the services described below on behalf of the Organization to support their enrollment goals and objectives.

1. Coordination of Services

    Upon execution of this Program Order Form, EAB will assign a team led by key senior EAB staff member (Principal or Strategic Leader) who will serve as Organization's primary point of contact and work collaboratively with Organization leaders and staff to meet the program objectives outlined herein.

    The EAB staff member is responsible for coordinating service delivery and program management across the Term, including program messaging, sequencing, and utilization of paper and electronic media.

    EAB staff is available to travel to Organization's campus as well as host Organization staff at EAB's premises, to the extent permissible by Organization's policies and procedures, to discuss the services provided under the terms of this Agreement. All associated travel costs are assumed by EAB; the Organization is not assessed any incremental fees for travel.

2. Financial Aid Services - Summary of Program Services

    Financial Aid Optimization

    Financial Aid Descriptive Analysis

    a. Services include the development of an extensive database from the combined admissions and financial aid data we acquire from you.

    b. From this database, we build a descriptive analysis which illustrates the behavior of the admitted student cohort for the most recently recruited classes, as a group and by segments.

    c. The descriptive analysis provides a review of the composition of the admitted student cohort, by segment, and how such responded to offers of grant aid.

3. The Price Optimization Model

    a. Services also include the results from a statistically-driven live simulation model.

    b. Built into the model is the capacity to simulate financial aid packages for individual students, including add-on or stacked awards.

    c. In addition to customizing award strategy, this model is capable of showing the results of admitting more or less students from individual cells, or "buckets," in Organization's matrix.

    d. The simulation model allows manually adjusting yield expectations by cell.

    e. Award simulation and aid policy development counsel

    f. Tactical counsel for implementation of the aid policy

4. Monitoring

    a. As financial aid data starts coming in, we monitor the composition of Organization's admitted student cohort and actual awards to inform potential mid-course adjustments. This monitoring process continues with your recruitment cycle.

    b.

5. Data & Technical Specifications – General Requirements

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In order to provide Organization with the services outlined above in a timely and accurate manner, Organization agrees to complete the following requirements related to data exchange by the specified dates or milestones.

   a. Identify a Data Lead(s) and participate in Data Planning Call(s) within one (1) week of EAB's request

   b. Provide comprehensive and valid data files as outlined below on or before a date agreed upon in the Data Planning Call(s)

   c. Coordinate with EAB to ensure that the application data are reliable and valid. EAB will provide test cases for Organization to validate against their source systems [Not Applicable to Financial Aid Optimization]

   d. Share Single Sign On protocol to establish secure identity management between systems within the first six weeks of the start of the Program Term [Only Applicable to the Transfer Portal programs]

   e. Automate data feeds at EAB-requested frequency by the end of the data implementation

6. <u>Program Data Requirements</u>: Pursuant to the timeline above, Organization will transmit valid data files from the below source systems to EAB's secure data center that correspond to the applicable Program(s) provided herein.

Program	Source Systems	Details
Undergraduate Enrollment Services (Search, App Marketing, etc.)	SIS, ERP, and/or CRM	Including current and historical entering class data (up to 3 finalized years)
Financial Aid Optimization	SIS, ERP, Financial Aid System(s), and/or CRM	Including current and historical admitted and enrolling students (up to 5 finalized years)
Transfer Portal	SIS, Degree Audit	Institutional course equivalencies and AP/IB/CLEP exams; degree rules

7. <u>Data Integration Services</u>

   EAB's Data Integration Services are a set of highly recommended yet optional delivery services provided at no additional cost to generate necessary Organization data from Organization's SIS, ERP or CRM to implement the Program(s) outlined herein. This service is available for the following source systems: Ellucian Banner, Campus-Vue, Peoplesoft, PowerCampus, Slate, Target X (includes Jenzabar JRM), Jenzabar CX, Jenzabar EX, CAMS, Hobsons Connect, Ellucian Colleague on SQL Server (not Unidata), and Campus-hosted or Cloud-hosted Ellucian Recruit/Recruiter (required connection to established backend database). If you have a different source system, EAB will conduct a feasibility assessment to determine if EAB can provide Data Integration Services for that system. EAB is not in any case responsible for third-party licensing fees to extract or integrate data from the above source systems as part of the Data Integration Services or any subsequent data integration or extraction work from any data source, even if provided as part of the Data Integration Services described below.

8. Implementation Support – If applicable, in providing the Data Integration Services, EAB will, where possible:

   a) Outline source data fields required for implementation of Program(s) in consultation with EAB staff and Organization subject matter experts;

   b) Create SQL queries to extract data or code in the Query Environment specified above to output data files for implementation of the Program(s);

   c) Develop query logic and/or code to generate regular updates of the output data files on a frequency needed by the Program(s); and

   d) Work with Organization's staff to integrate the Data Integration Services queries or code into the production environment.

9. Institution Support Requirements – If applicable, EAB will provide Organization with the Data Integration Services at no additional cost. Shortly after executing the Agreement, Organization and an assigned team of EAB employees will participate in a "Technical Planning Call" to discuss the 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 applicable source system for the Data Integration Services pursuant to a written addendum.

10. Data Access Permissions – Organization will coordinate the delivery to EAB of any and all confidentiality agreements, data use agreements, or similar agreements required by Organization's source system vendor(s) in order to permit EAB access to interact with Organization's source system(s) and deliver appropriate data feeds to EAB. All such documentation shall be delivered to EAB one (1) week after the Technical Planning Call.

System Conversions, Upgrades and Other Changes

Program fees are based upon Organization's current source system(s). For any system conversions and/or material upgrades that impact integration points such as web-service APIs that require reprocessing, remapping and revalidation of data, EAB 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 to by both parties must be completed prior to starting any re-implementation. EAB is not responsible for any impacts on or delays to the Program(s) due to any system modifications.

Source System	One-Time Fee
SIS	10% of applicable current FY program fees, OR a maximum of $40,000
Degree Audit System	5% of applicable current FY program fees, OR a maximum of $20,000
CRM	5% of applicable current FY program fees, OR a maximum of $20,000
Financial Aid System	5% of applicable current FY program fees, OR a maximum of

	$10,000

11. Data Aggregation: EAB may aggregate or analyze student-level and institutional-level data across Organization cohorts to enhance the Program(s). EAB may provide these insights from such analysis to Organization in various forms, for example, benchmarking Organization's performance against a group of peer institutions, which may include data at the individual student level. EAB may also use such information to optimize and improve the efficacy of the Program(s) relative to individual students, such as modifying communication strategies based on student-level or parent-level behavior across all of EAB's interactions with such individual.