STATE BOARD FOR COMMUNITY COLLEGES AND OCCUPATIONAL EDUCATION

June 12, 2024

TOPIC: Approval to Acquire EAB's Edify Platform

PRESENTED BY: Julie Ouska, Vice Chancellor Information Technology/CIO

RELATIONSHIP TO THE STRATEGIC PLAN:
Develop System-wide capacity in institutional research and data analytics to support a culture of inquiry, evidentiary decision making and student success.

EXPLANATION:
Approximately two years ago, System Institutional Research and Business Intelligence (IRBI) began exploration of moving toward a data warehouse. The architecture of a data warehouse is specific to a data analytics approach rather than a reporting approach, which is the structure of our current Operational Data Store (ODS). The ODS structure does not lend itself to the type of analytical and dashboard development needed by the system office and the colleges. A data warehouse aggregates and integrates data from all your systems in a central, highly customizable platform. Staff performed a needs assessment and explored an internal build of a data warehouse as well as commercially available products. One aspect stood out clearly from the needs assessment which was a robust data warehouse was needed in the near term. The colleges' ability to analyze data, and the system office's ability to provide that data, were very insufficient and demand for a solid solution sooner rather than later was high. Conversations with various stakeholder groups and college leadership indicated a growing interest in EAB's Edify as a solution for our system.

The IRBI team conducted an in-depth technical evaluation of EAB's Edify data warehouse product in terms of its suitability to our system-wide environment including data from our many systems, including from Banner, Degree Works, CRM Recruit, EAB Navigate and external data sources, scalability and alignment with the needs assessment

Once we felt Edify was a very viable solution for us, more conversations occurred with the colleges at various levels and the Executive IT Strategy Committee. Reference checks with the Colorado School of Mines indicated their implementation of Edify was progressing as planned and gave us additional insight into Edify and implementation requirements. Both Colorado School of Mines and Western State University, whose implementation is just getting started, acquired Edify through a competitive Request for Proposal (RFP) process. Unfortunately, neither RFP had the required inclusive

language that would have allowed another Colorado institution to use their RFP results. The State of New Jersey did a competitive RFP for all their public higher education institutions and the State of Colorado has approved our use of their agreement as long as our contract does not exceed the length of that agreement, which is four years.

Combined with the technical assessment, numerous demonstrations to various college constituency groups throughout the system a decision was made by the college presidents to move forward with the acquisition and implementation of Edify. A cost allocation model was developed by system finance with input from the college Business Officers and includes the system office in all of the core deployment and system integration costs for the central data warehouse and a significant portion of the data modeling and analytics costs, as well as a portion of the ongoing annual costs with the colleges covering the balance of the data modeling and analytic costs and ongoing annual costs. In the first year, the eight larger colleges are covering the implementation and ongoing costs for the six rural colleges. Each college will pay for the hours they use for training and customizations. These costs were included in the system office budget and college budgets that were approved earlier in the meeting by the Board.

Lisa Matye-Edwards, ACC's Vice President of Student Affairs and Tanya Brown, ACC's Director of Strategy and Analytics provided the following statement shared by Dr. Stephanie Fujii, President of Arapahoe Community College, in support of implementing Edify.

> The addition of Edify would empower staff at the colleges within the Colorado Community College System (CCCS) to optimize data-informed decision-making, fostering a culture where supporting their communities and student success is at the forefront of every initiative, and have access to data and analytics at the user level without adding additional staff or relying on other colleges for support.
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> By investing in Edify technology that addresses multiple and varied data needs, the colleges can overcome challenges and enhance their ability to prioritize and support the institution's decisions using data information that drives efficiency, leverage a research infrastructure, fostering partnerships, allows the colleges to take significant strides toward promoting a more inclusive and equitable educational environment, and improve educational offerings for their communities.
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> Edify will allow access to dashboards and efficiency of pulling data from multiple sources to create consumable and simplified reporting, a functional data-warehouse and delivered best-practice dashboards. This will allow for strategic planning, data-informed decision making.

From a rural college perspective, Dr. Lisa Jones, President of Colorado Northwestern Community College provided this statement.

> As a small institution, it is important that every financial decision be a data driven one. We have many needs that must be met simultaneously and the ones that have greater impact on safety, sustainability and academic excellence must be addressed first. The opportunity to on-board Edify is one I am excited about because it is the first time since my arrival at CNCC, that I feel like I can begin working smarter rather than harder to lead in a data driven way. I will be able to bring to more meetings data reports that tell a story…. pointing to trends that outline a problem, or other trends that confirm why an action was the right one to make. It will motivate more leaders within the college at all levels and across all department lines to utilize data in discussions as a starting point instead of as an afterthought because these data will be accessible and in formats to aid the user in getting to the point quicker. Though our front range colleagues will surely tell you how this will help them in their work, Rural Colleges do not have a "deep bench" in any department. Most, if not all, have .5 to 1FTE in institutional effectiveness, which means that we do not have staff to create useful reports to aid us in grant writing or day to day decision making. These professional barely have the time to deliver enrollment reports and complete compliance reporting. We see Edify is a cost-effective means of filling these important gaps.

Dr. Kelly Scott, CNCC's Executive Director of Institutional Effectiveness provided her thoughts as well.

> We are very excited about Edify's ability to provide improved access to cross-functional data in a more flexible and user-friendly way than currently available to each college. We are hopeful it can help us better answer critical institution-wide questions around enrollment and sustainability in a more efficient way. More informed day to day decisions will result from easier access to not only the data, but the quick analysis that Edify can hopefully provide.

The implementation will begin very shortly after the start of the 2025 Fiscal year, July 1, 2024. The initial portion of the implementation will be focused on building the centralized system data warehouse which includes data for all thirteen colleges from our enterprise data systems. To ensure appropriate input in the development of the central data warehouse, the implementation team will include significant college stakeholder representation. Once built, a separate data warehouse derived from the central warehouse is provided to each college. This allows each college the ability to access their data warehouse independently and add additional data specific to their institution as needed. A data visualization tool, Good Data, is provided with the Edify product with unlimited licensing although colleges may use other tools if they wish.

The implementation is planned for two years. During those initial two years, six system-wide dashboard accelerators will be provided representing key areas such as Strategic Enrollment Management, Student Success and Retention, Financial Sustainability and Course Planning and Optimization. The new CCCS Strategic Plan being developed will inform these dashboards. Individual dashboards will be provided to each college and

can be modified for specific college metrics and goals. The colleges will implement their warehouses divided into three waves over each of the two implementation years. The goal is to provide a usable data warehouse with key data for all colleges by the end of the first year and incorporate additional data and capabilities the second year. Part of the implementation costs include hours for minor customizations of dashboard accelerators and data sources at the college level. The hours will be apportioned by need as some colleges may need very little or no customizations. If a college requests something out of scope, they have the option to pay for it themselves under a separate Statement of Work, so a modest amount of $100,000 is included in the total amount for Board approval.

Contract Maximum Amount

Initial Term	July 1, 2024
State Fiscal Year 2025	$1,887,950
Extension Terms	
State Fiscal Year 2026	$1,831,150
State Fiscal Year 2027	$1,555,650
State Fiscal Year 2028	$1,555,650
Contract Total for All State Fiscal Years	$6,830,400
College specific Statements of Work	$ 100,000
Spending Authority Total for All Fiscal Years	$6,930,400

Current Contract Expiration Date   June 30, 2028

RECOMMENDATION:

Staff recommends the approval for CCCS to proceed with the acquisition of EAB's Edify with a do not exceed amount of $6,930,400 over four fiscal years Staff also recommends that the Board delegate to the System Vice Chancellor of Finance and Administration the authority to sign all related contract documents on the condition that all Board and State processes are followed.