



CONTRACT MODIFICATION

Date: September 27, 2024
Contract #: UCPJMU6512
Service: Customer Relationship Management System
Modification #: Eleven
Issued By: James Madison University Ph: 540-568-3137
Colleen Johnson, Lead Commodity Contract Officer &
Project Manager Fx: 540-568-7935
Contractor: Huron Consulting Services
Attn: Geoffrey Corb
550 W. Van Buren Street
Chicago, IL 60607
Contract Administrator: Robin Bryan, Information Technology

Description of Modification Notice:

The attached Huron Change Order, dated September 19, 2024, hereby modifies UCPJMU6512 Negotiation Summary Attachment A Statement of Work for the referenced narrative and pricing sections therein.

Except as provided herein, all terms and conditions of Contract Number UCPJMU6512 as herefore changed, remain unchanged and in full force and effect.

Huron Consulting Services

By:

Geoffrey Corb

Name (print)

Managing Director

9/27/2024

Title

Date Signed

James Madison University

By:

Colleen Johnson, CUPO

Name (print)

9/27/2024

Lead Commodity Contract Officer & Project Manager

Title

Date Signed

September 19, 2024
James Madison University
800 South Main Street
Harrisonburg, VA 22807

This Change Order ("Change Order"), effective as of the last date of signature below, describes changes to ATTACHMENT A - Statement of Work #1 (the "SOW"), signed January 24, 2023, entered by and between Huron Consulting Services LLC ("Consultant") and James Madison University ("University"), entered pursuant to that certain Consulting Services Agreement, effective January 25, 2023 ("Agreement").

The SOW is amended as follows:

Amended Section: Timeline, Budget, & Resources:

This Change Order is for an extension on timeline and budget for the Advancement (Workstream 3) CRM Implementation. This change order includes an 8-week extension for go-live critical items. This will involve the build, test, and train-the-trainer training for system users.

During these 8-weeks, the sprint iteration plan is broken up into the following Epics (category blocks) during each of the 2-week iterations. Stories are categorized under each Epic. Story progress, and related information needed to complete tasks will be tracked in the Azure DevOps system. The overall project timeline will be tracked in Smartsheets – as is currently done. Huron and JMU will determine and focus on stories, issues, bugs that are go-live critical under each epic.

Sprint Cadence for Epics

- **Iteration 1**
 - Configuration & bug fixes for Prospect Management
 - *Apsona
 - Security & Permissions
 - Data Conversion – Gift Data, Pledge Data
 - Integrations
- **Iteration 2**
 - Configuration & bug fixes for Bio-Demo
 - Configuration & bug fixes for Gift, including giving summaries/gift clubs
 - Configuration f& bug fixes or Cases
 - *Apsona (Continued)
 - Security & Permissions (Continued)
 - Data Conversion – Gift Data, Pledge Data, Prospect Data
 - Integrations
- **Iteration 3**
 - Configuration & bug fixes for Constituent Engagement, including Engagement Scoring
 - Configuration & bug fixes for Campaign
 - *Apsona (Continued)
 - Security & Permissions (Continued)
 - Data Conversion – Prospect Data, Constituent Engagement
 - Integrations
- **Iteration 4**
 - Remaining go-live configuration and bug fixes from previous iterations
 - Third-Party Applications
 - DonorSearch
 - OnBase
 - Maps
 - *Apsona (Continued)
 - Security & Permissions (Continued)
 - Data Conversion – Remaining items from previous iterations

*Apsona build will consist of multiple iterations. It will deliver the ten (10) templates as defined in the original scope, and be divided among the following areas as determined in each sprint iteration:

- Receipts
- Acknowledgements
- Presidential Profiles
- Reporting

Timeline & Deliverables

The sprint iterations being added are starting September 2, 2024, and continuing through to October 18, 2024. The project timeline for the remaining workstreams are as follows:

9/2 - 9/13: Iteration 1

9/16 - 9/27: Iteration 2

9/30 - 10/11: Iteration 3

10/14 - 10/18: Iteration 4

10/21 - 11/1: Train the trainer

11/4 - 11/15: End user training & 3rd data conversion/sandbox refreshes

11/18 - 12/6: Data validation/bug cleanup after sandbox refreshes

12/9 - 12/19: User Acceptance Testing (UAT)

1/13 - 1/17: Retest fixes from UAT

1/21 – 3/21: Majority of system work by Huron pauses; JMU internally uses this time to align on processes, documentation, and reporting. See bullet below and Conversion-Only Period section.

- During the "pause" prior to go-live, JMU may direct Huron resources to focus on specific items of high importance within the allotted availability (for example Griffin configuring a few Affinaquest page layouts for mobile devices)

3/21 – 4/7: Advance goes down for conversion (technically live after 4/7, but can-do soft go-live to validate)

4/14: Go-Live

Marketing Cloud

- Part of enterprise, anticipated work in October (Pending JMU Final Decisions). Marketing Cloud implementation will continue as part of the Enterprise portion of the project

Integration Extension

Integration hours will be increased by 8 weeks from the end of the current scheduled integration completion until 10/21/2024. Integration hours will be added to complete work previously identified for:

- PeopleSoft

- Student data,
- parent data,
- employee data
- degrees, majors,
- minors,
- financial aid,
- scholarship awards,
- amounts,
- academic structure
- GiveCampus
 - Outbound from Salesforce = Designations, Bio-Demo,
 - Inbound = donors, designations, amount, method
- Paciolin
 - Ticket purchase
 - Gifts made
 - Bio-demo info
- Blackbaud – Madison Scholarship Hub (MSH)
 - Pictures
 - Basic fund information

Conversion-only Period

An additional period will be added for data conversion work while JMU pauses project work for internal operations. During this period only data conversion activities will continue, and the conversion team will remain in reduced hours and capacity to refine the data conversion. The goal is for data to be production ready and close any remaining go-live critical data conversion items. Once the project resumes, loads will take place that facilitate production cutover activities. The project will resume after this period with the current go-live cutover activities. Roles have been updated below to show hours and fees related to this additional period.

Added Resource Cost:

Workstream	RESOURCE NAME	Bill Rate	TOTAL FEES	TOTAL HRS
Advancement	Griffin Homan	\$285	\$ 45,600.00	160
Advancement	Kevin Flaherty	\$285	\$ 45,600.00	160
Advancement	Michael O'Hare	\$230	\$ 36,800.00	160
Advancement	Syed Mohsin Ali Rizvi	\$305	\$ 48,800.00	160
Advancement	Developer-Offshore (Arun)	\$60	\$ 19,200.00	320
Advancement	Joshwin Maggesto	\$285	\$ 9,120.00	32
Integration	Brandon Nielson	\$285	\$ 45,600.00	160
Integration	Developer-Offshore (Vivek)	\$65	\$ 20,800.00	320
			\$ 271,520.00	1,472
Conversion-only staff	1/20/25-3/21/25			
Workstream	Griffin Homan	\$285	\$ 12,825.00	45
Workstream	Syed Mohsin Ali Rizvi	\$305	\$ 27,450.00	90
Workstream	Developer-Offshore (Arun)	\$60	\$ 21,600.00	360
			\$ 61,875.00	495
Total			\$ 333,395.00	1,967

Edit Section From:

No.	Worsktreame	Role	Remote Rate	Hours	Cost
1	Enterprise	Engagement Director	305	343.5	\$ 104,767.50
2	Enterprise	Program Manager	285	1019	\$ 290,415.00
3	Enterprise	Marketing Architect	305	93	\$ 28,365.00
4	Enterprise	Marketing Solution Architect	285	480	\$ 136,800.00
5	Enterprise	Marketing Developer	65	280	\$ 18,200.00
6	Enterprise	Marketing Analyst	230	320	\$ 73,600.00
7	Enterprise	Assessment Solution Architect	305	283.5	\$ 86,467.50
8	Enterprise	Assessment Business Analyst	285	302	\$ 86,070.00
9	Student Success	Engagement Lead	305	135	\$ 41,175.00
10	Student Success	Project Manager	285	520	\$ 148,200.00
11	Student Success	Solution Architect	305	854	\$ 260,470.00
12	Student Success	Business Analyst	230	1024	\$ 235,520.00
13	Student Success	BA/QA/Tester	60	780	\$ 46,800.00
14	Student Success	Business Analyst	60	257	\$ 15,420.00
15	Admissions	Engagement Lead	305	130	\$ 39,650.00
16	Admissions	Solution Architect	305	1120	\$ 341,600.00
17	Admissions	Project Manager	285	520	\$ 148,200.00
18	Admissions	Business Analyst	230	520	\$ 119,600.00
19	Admissions	Technical Lead	230	780	\$ 179,400.00
20	Admissions	Technical Architect	305	240	\$ 73,200.00
21	Admissions	Developer	75	640	\$ 48,000.00
22	Admissions	Business Analyst	65	1264	\$ 82,160.00
23	Advancement	Engagement Lead	305	360	\$ 109,800.00
24	Advancement	Project Management	285	1782.5263	\$ 508,020.00
25	Advancement	Solution Architect	285	1320.5263	\$ 376,350.00
26	Advancement	Technical Architect	305	1225.3115	\$ 373,720.00
27	Advancement	Technical Architect	95	1360	\$ 129,200.00
28	Advancement	Business Analyst	230	2567.0435	\$ 590,420.00
29	Advancement	Business Analyst	230	520	\$ 119,600.00
30	Advancement	Developer	65	1140	\$ 74,100.00
31	Advancement	Developer	60	360	\$ 21,600.00
32	Advancement	Business Analyst	210	230	\$ 48,300.00
33	Advancement	Developer	60	0	\$ -
34	Advancement	Technical Lead	75	1080	\$ 81,000.00
35	Advancement	Developer	60	0	\$ -
36	Advancement	Quality Assurance	60	2739	\$ 164,340.00
37	Advancement	CRM-A Architect	285	400	\$ 114,000.00
38	Advancement	CRM-A Associate	230	400	\$ 92,000.00
39	Advancement	Affinaquest SME Pool	225	0	\$ -
40	Advancement	Developer	60	276.66667	\$ 16,600.00
41	Integration	Solution Architect	285	729	\$ 207,765.00
42	Integration	Tech Architect-Dev Manager-Boomi	65	728	\$ 47,320.00
43	Integration	Developer - Boomi	65	2219	\$ 144,235.00
44	Integration	Developer	65	262	\$ 17,030.00
45	Integration	Quality Assurance	65	798	\$ 51,870.00
46	Admissions/Student Success Support	Solution Architect	305	256	\$ 78,080.00
47	Admissions/Student Success Support	Technical Architect	305	256	\$ 78,080.00
48	Admissions/Student Success Support	Developer	75	256	\$ 19,200.00
49	Admissions/Student Success Support	Business Analyst	65	256	\$ 16,640.00
50	Admissions/Student Success Support	Program Manager	285	25.6	\$ 7,296.00
					\$ 6,090,646.00

Edit Section To:

No.	Workstream	Role	Remote Rate	Hours	Cost
1	Enterprise	Engagement Director	305	343.5	\$ 104,767.50
2	Enterprise	Program Manager	285	1019	\$ 290,415.00
3	Enterprise	Marketing Architect	305	93	\$ 28,365.00
4	Enterprise	Marketing Solution Architect	285	480	\$ 136,800.00
5	Enterprise	Marketing Developer	65	280	\$ 18,200.00
6	Enterprise	Marketing Analyst	230	320	\$ 73,600.00
7	Enterprise	Assessment Solution Architect	305	283.5	\$ 86,467.50
8	Enterprise	Assessment Business Analyst	285	302	\$ 86,070.00
9	Student Success	Engagement Lead	305	135	\$ 41,175.00
10	Student Success	Project Manager	285	520	\$ 148,200.00
11	Student Success	Solution Architect	305	854	\$ 260,470.00
12	Student Success	Business Analyst	230	1024	\$ 235,520.00
13	Student Success	BA/QA/Tester	60	780	\$ 46,800.00
14	Student Success	Business Analyst	60	257	\$ 15,420.00
15	Admissions	Engagement Lead	305	130	\$ 39,650.00
16	Admissions	Solution Architect	305	1120	\$ 341,600.00
17	Admissions	Project Manager	285	520	\$ 148,200.00
18	Admissions	Business Analyst	230	520	\$ 119,600.00
19	Admissions	Technical Lead	230	780	\$ 179,400.00
20	Admissions	Technical Architect	305	240	\$ 73,200.00
21	Admissions	Developer	75	640	\$ 48,000.00
22	Admissions	Business Analyst	65	1264	\$ 82,160.00
23	Advancement	Engagement Lead	305	360	\$ 109,800.00
24	Advancement	Project Management	285	1942.5263	\$ 553,620.00
25	Advancement	Solution Architect	285	1525.5263	\$ 434,775.00
26	Advancement	Technical Architect	305	1475.3115	\$ 449,970.00
27	Advancement	Technical Architect	95	1360	\$ 129,200.00
28	Advancement	Business Analyst	230	2727.0435	\$ 627,220.00
29	Advancement	Business Analyst	230	520	\$ 119,600.00
30	Advancement	Developer	65	1140	\$ 74,100.00
31	Advancement	Developer	60	360	\$ 21,600.00
32	Advancement	Business Analyst	210	230	\$ 48,300.00
33	Advancement	Developer	60	0	\$ -
34	Advancement	Technical Lead	75	1080	\$ 81,000.00
35	Advancement	Developer	60	0	\$ -
36	Advancement	Quality Assurance	60	3419	\$ 205,140.00
37	Advancement	CRM-A Architect	285	432	\$ 123,120.00
38	Advancement	CRM-A Associate	230	400	\$ 92,000.00
39	Advancement	Affinaquest SME Pool	225	0	\$ -
40	Advancement	Developer	60	276.66667	\$ 16,600.00
41	Integration	Solution Architect	285	889	\$ 253,365.00
42	Integration	Tech Architect-Dev Manager-Boomi	65	728	\$ 47,320.00
43	Integration	Developer - Boomi	65	2539	\$ 165,035.00
44	Integration	Developer	65	262	\$ 17,030.00
45	Integration	Quality Assurance	65	798	\$ 51,870.00
46	Admissions/Student Success Support	Solution Architect	305	256	\$ 78,080.00
47	Admissions/Student Success Support	Technical Architect	305	416	\$ 126,880.00
48	Admissions/Student Success Support	Developer	75	456	\$ 34,200.00
49	Admissions/Student Success Support	Business Analyst	65	256	\$ 16,640.00
50	Admissions/Student Success Support	Program Manager	285	37.6	\$ 10,716.00
					\$6,491,261.00

***Edit Section To** also reflects \$67,220.00 added to UCPJMU6512 in Modification #10 for Group Advising Appointments (Previously referenced as Workstream “Advising” now Included in Admissions/Student Success Support lines 46-50 herein).

Edit Section From:

PHASE	ESTIMATE
Workstream 1: Enterprise-wide Functionality (includes Integrations total)	\$ 1,292,905.00
Workstream 2: Advising	\$ 747,585.00
Workstream 3: Advancement	\$ 2,819,050.00
Workstream 4: Admissions	\$ 1,031,810.00
Workstream 5: Admissions/SS Support	\$ 199,296.00
	\$ 6,090,646.00

Edit Section To:

PHASE	ESTIMATE
Workstream 1: Enterprise-wide Functionality (includes Integrations total)	\$ 1,359,305.00
Workstream 2: Advising	\$ 747,585.00
Workstream 3: Advancement	\$ 3,086,045.00
Workstream 4: Admissions	\$ 1,031,810.00
Workstream 5: Admissions/SS Support	\$ 266,516.00
	\$ 6,491,261.00

***Edit Section To also reflects \$67,220.00 added to UCPJMU6512 in Modification #10 for Group Advising Appointments (Previously referenced as Workstream "Advising" now Included in Workstream 5: Admissions/Student Success Support).**

This Change Order constitutes the entire understanding between Client and Huron with respect to the foregoing changes, supersedes all prior oral and written communications with respect to such changes, and may be amended, modified or changed only in writing when signed by both parties. Except as expressly modified herein, all other terms and conditions of the Statement of Work and the Agreement remain unchanged.

Please indicate your agreement to this Change Order by signing and returning to Huron a copy of this letter. We appreciate the opportunity to be of service to you.

Very truly yours,

HURON CONSULTING SERVICES LLC

By: _____

Acknowledged and Accepted: JAMES MADISON UNIVERSITY

By: _____

Title: _Lead Commodity Contract Officer & Project Manager_____

Date: __9/27/2024_____