STATE OF NORTH CAROLINA **NC COMMUNITY COLLEGE SYSTEM** **Technology Solutions & Distance Learning** *Refer __all__ inquiries regarding this IFB to:* Grant Braley braleyg@nccommunitycolleges.edu (919) 807-7199	**INVITATION FOR BIDS NO. 50-2223035**
	Offers will be publicly opened: November 8, 2023
	Issue Date: October 17, 2023
	Commodity Number: 43232303 – Customer Relationship Management (CRM) Software
	Description: Recruiting & Admissions CRM Solution
	Using Agency: NC Community College System
	Requisition No.: N/A

OFFER AND ACCEPTANCE

The State seeks offers for the goods, software, and/or services described in this Invitation for Bids (IFB). The State's acceptance of any offer must be demonstrated by execution of the acceptance found below and any subsequent Request for Best and Final Offer (BAFO), if issued. Acceptance shall create a contract having an order of precedence as follows in cases of conflict between documents comprising the contract: (1) Best and Final Offers, if any; (2) special terms and conditions specific to this IFB; (3) specifications; (4) NC Department of Information Technology (NCDIT) Terms and Conditions of this IFB; and (5) the agreed portions of the awarded Vendor's Offer. **No contract shall be binding on the State until an encumbrance of funds has been made for payment of the sums due under the contract.**

EXECUTION

In compliance with this IFB, and subject to all the conditions herein, the undersigned offers and agrees to furnish any or all Services or goods upon which prices are offered, at the price(s) offered herein, within the time specified herein. By executing this offer, I certify that this offer is submitted competitively and without collusion.
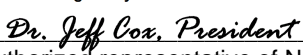
Failure to execute/sign offer prior to submittal shall render offer invalid. Late offers are not acceptable.
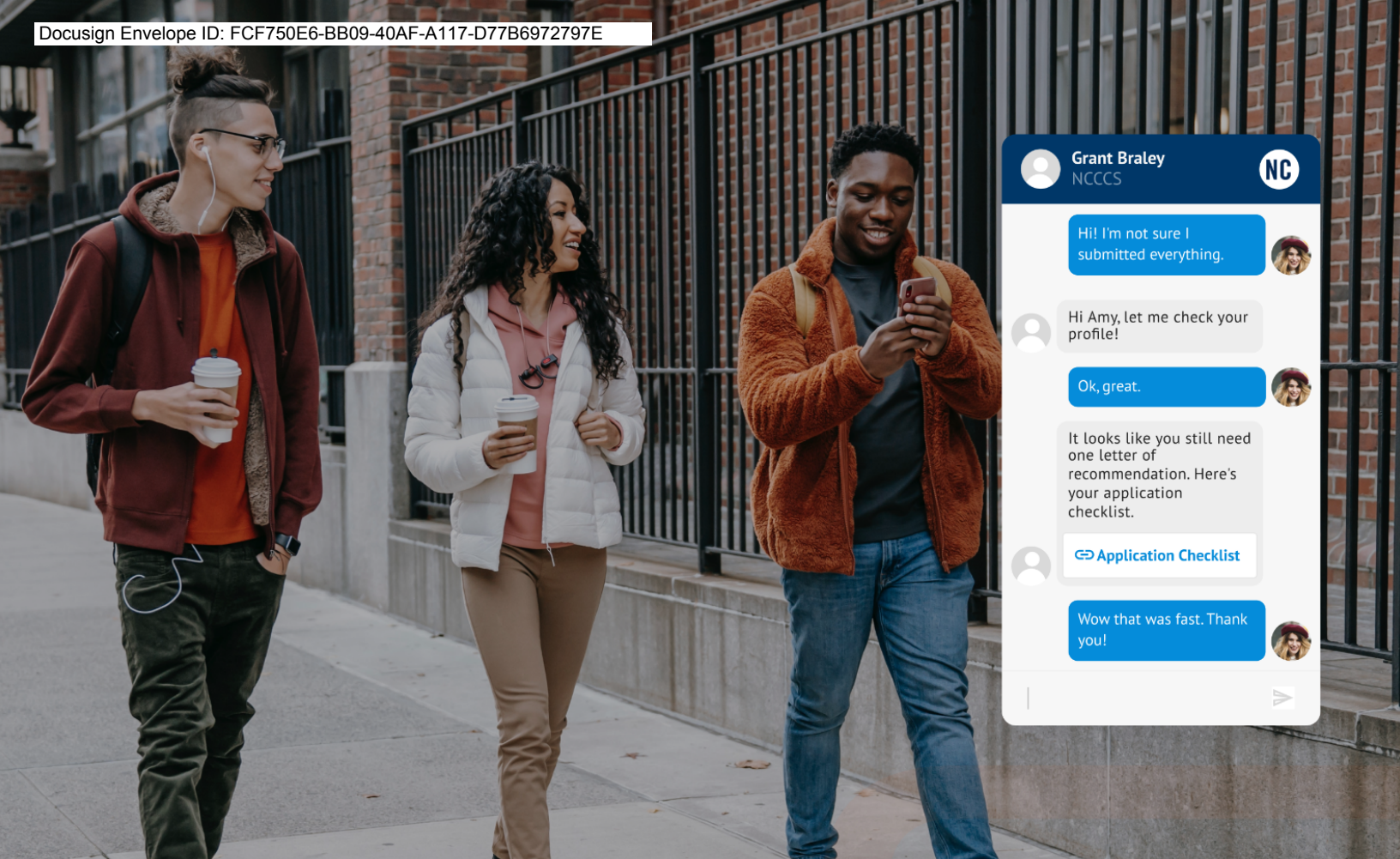
OFFEROR Element451 Inc. DBA Element451		
STREET ADDRESS 1 Glenwood Ave, 5th Floor	PO BOX and ZIP CODE	
CITY, STATE, ZIP CODE Raleigh, NC 27603	TELEPHONE NUMBER 718.644.2026	TOLL FREE TEL. NO
PRINT NAME and TITLE OF PERSON SIGNING Ardis Kadiu CEO	FAX NUMBER	
AUTHORIZED SIGNATURE *Ardis Kadiu*	DATE Nov 9, 2023	E-MAIL ardis@element451.com

Offer valid for ninety (90) days from date of offer opening unless otherwise stated here: _____ days

ACCEPTANCE OF OFFER

If any or all parts of this IFB are accepted, an authorized representative of the NC Community College System (NCCCS) shall affix a signature hereto. A copy of this acceptance will be forwarded to the successful Vendor.

FOR STATE USE ONLY
Offer accepted and Contract awarded as indicated on the attached certification by

DocuSigned by:

Dr. Jeff Cox, President   12/17/2024

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Authorized representative of NC Community College System   Date

element451 × **NC COMMUNITY COLLEGES** CREATING SUCCESS

Due Date 2023-11-15 at 2:00 PM EST

Element451 Submittal For:

North Carolina Community College System

REQUEST FOR PROPOSAL
RFP: 50-2223035
Technical Proposal

Prepared by

Heather Russell

919.961.9883

hrussell@element451.com

1 Glenwood Ave, 5th Floor

Raleigh, NC 27603

element451.com

Cover Letter

Grant Braley
North Carolina Community College System
200 West Jones Street
Raleigh, North Carolina 27603

Dear Grant:

Element451 is excited about the opportunity to provide North Carolina Community College System ("NCCCS") with our proposal and detailed response to North Carolina Community College System's RFP 50-2223035 issued on October 17th, 2023. Our goal is to provide you, the NCCCS team, and each of its institutions with all the information to support the critical decision of choosing a CRM system to enhance the recruitment process through improved communications, event planning, application submission, and data analytics.

At Element451, we envision the future of tech engagement as a realm where conversation is paramount. In the ever-evolving digital landscape of higher education, we pride ourselves on ensuring that every interaction between your esteemed institutions and their students is deeply meaningful, uniquely personalized (down to a segment of one), and engaging. Our AI-driven platform is specially designed to make this vision a reality.

Our core beliefs align seamlessly with NCCCS's mission:

- **Engaging Conversations**: We understand that today's digital world is about more than just one-way communication. Our platform promotes rich two-way dialogues, instilling a profound sense of belonging and forging relationships that transcend screens.

- **AI-Powered Personalization**: Our AI capabilities sift through expansive data, calibrating the narrative to resonate with every unique student persona, ensuring that every message is not merely a fleeting impression but an impactful echo.

- **Value Beyond Software**: We believe in empowering your institutions. While our AI takes on the heavy lifting of personalization, your dedicated teams can concentrate on nurturing genuine bonds that cultivate a vibrant academic community.

- **Beyond a CRM**: We offer more than a tool; we offer a compass to guide institutions through the intricate labyrinth of tech-driven student engagement.
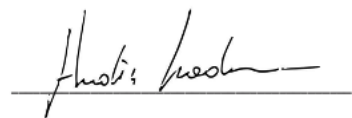
The RFP's focus on creating a more personalized recruitment process aligns perfectly with our mission at Element451. With our platform, every message sent won't just be another notification; it will be a curated journey that resonates, guiding students from initial interest to committed enrollment.

We are confident that our solution aligns with NCCCS's vision for a more personalized and efficient recruitment process for all fifty-eight North Carolina Community Colleges (some of which are already valued partners). We are eager to be part of this transformative journey, ensuring that each institution not only keeps pace with the tech tide but truly ***harnesses the power of conversational engagement***.

I, Heather Russell, whose information is below, will be the person authorized to contractually obligate our organization, the person authorized to negotiate the Agreement on behalf of Element451, and NCCCS's contact for clarification. Element451 acknowledges receipt of all amendments to this RFP. On behalf of the team at Element451, I thank you for including us in this critical process. We look forward to the possibility of partnering with NCCCS to elevate the recruitment experience for every prospective student in North Carolina.

Best Regards,

Heather Russell, *University Partnerships Manager*
919-961-9883 (Heather)
hrussell@element451.com

Executive Summary

In an increasingly digital world, the North Carolina Community College System (NCCCS) recognizes the imperative of adopting an agile, user-friendly, and AI-driven platform to enhance the recruitment process across its fifty-eight community colleges. Element451, with its forward-thinking approach to tech engagement, presents a uniquely tailored solution to meet and surpass these needs.

Holistic Integration & Compatibility
Our SaaS solution is engineered to seamlessly integrate with a wide array of platforms crucial to the NCCCS ecosystem. From Microsoft Office 365 and various Ellucian offerings to LMS systems like Blackboard and Moodle, Element451 offers a harmonious amalgamation of tools to streamline processes and enhance user experience.

Enhanced Communication
At the heart of Element451 is the vision of fostering genuine conversations. Our platform not only enables two-way communication channels via email and SMS but also optimizes outreach efforts through targeted mailing lists (down to segments of one), ensuring every student feels heard and valued.

Efficient Application Lifecycle Management
Recognizing the intricate nuances of application management, our solution offers a comprehensive portal that streamlines submissions, offers real-time tracking, and ensures timely notifications. Furthermore, adherence to Section 508 of the Rehabilitation Act guarantees an accessible experience for all users.

Event & Analytics Mastery
From simplifying event scheduling to offering analytical insights through robust dashboards, Element451 ensures NCCCS institutions will remain at the forefront of engagement strategies. Our ability to generate both standard and custom reports offers a transparent view into the recruitment process, aiding data-driven decisions.

Unwavering Performance & Security
With a commitment to 99.9% availability and rapid data synchronization, Element451 promises optimal performance. Our stringent security protocols, paired with disaster recovery plans aligned with NIST 800-53 standards, ensure data integrity and user confidence.

In summary, Element451 is not just a platform; it's a paradigm shift in tech engagement for academic institutions. With AI at its core and a suite of features tailor-made for NCCCS's aspirations, we are poised to redefine the student recruitment experience in North Carolina.

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3.0 GENERAL SPECIFICATIONS

3.1 VENDOR STANDARD AGREEMENT(S)

The terms and conditions of Vendor's standard services, license, maintenance, or other agreement(s) applicable to Services, Goods, Software, and other Products acquired under this Agreement may apply to the extent such terms and conditions do not materially change the terms and conditions of this Agreement. In the event of any conflict between the terms and conditions of this Agreement and the Vendor's standard agreement(s), the terms and conditions of this Agreement relating to audit and records, jurisdiction, choice of law, the State's electronic procurement application of law or administrative rules, the remedy for intellectual property infringement and the exclusive remedies and limitation of liability in the DIT Terms and Conditions herein shall apply in all cases and supersede any provisions contained in Vendor's relevant standard agreement or any other agreement. The State shall not be obligated under any standard license and/or maintenance or other Vendor agreement(s) to indemnify or hold harmless the Vendor, its licensors, successors or assigns; nor arbitrate any dispute, nor pay late fees, legal fees, or other similar costs.

Element451 has provided a copy of our MSA and SLA (**Exhibit A**) for NCCCS. Element451 would like to suggest mutual indemnification as our MSA states.

3.2 VENDOR UTILIZATION OF WORKERS OUTSIDE U.S.

In accordance with N.C.G.S. § 143B-1361(b), the Vendor must detail in its response the manner in which it intends to utilize resources or workers located outside the U.S. The State of North Carolina will evaluate the additional risks, costs, and other factors associated with such utilization prior to making an award for any such Vendor's offer. The Vendor shall provide the following for any offer or actual utilization or contract performance:

a) The location of work performed under a state contract by the Vendor, any subcontractors, employees, or other persons performing the contract and whether any of this work will be performed outside the United States.

All work for NCCCS will be completed within the continental United States.

b) The corporate structure and location of corporate employees and activities of the Vendors, its affiliates, or any other subcontractors.

Element451 is headquartered in Raleigh, NC, with several employees residing there. Our CEO and CMO reside in Raleigh, NC. Our CRO resides in Austin, Texas.

Your Element451 partnership representative, Heather Russell, is a NC native and fellow CFCC and WTCC alum. Heather regularly engages in travel to various North Carolina Community College's for events, trainings, and evaluation discussions.

Our VP of Customer Success, all Customer Success Managers, all Implementation Specialists, and all Support Specialists reside and work remotely in the continental United States.

Element451 does not use third-party subcontractors.

c) Notice of the relocation of the Vendor, employees of the Vendor, subcontractors of the Vendor, or other persons performing Services under a state contract outside of the United States.

Element451 is headquartered in Raleigh, NC, with no plans to relocate. We agree to notify NCCCS, if an employee of Element451 that NCCCS works with, decides to relocate out of the continental United States.

d) Any Vendor or subcontractor providing call or contact center Services to the State of North Carolina shall disclose to inbound callers the location from which the call or contact center Services are being provided.

Element451 agrees to this. All of our Customer Success Team is located within the continental United States. We offer live support to all of our partners from 9:00 AM - 5:00 PM EST, Monday through Friday.

Will any work under this contract be performed outside the United States? YES NO

No.

If YES, list the location(s) outside the United States where work will be performed by the Vendor, sub-contractors, employees, or other persons:

_____

Not Applicable.

3.3 E-VERIFY

Pursuant to N.C.G.S. § 143B-1350(k), the State shall not enter into a contract unless the awarded Vendor and each of its subcontractors comply with the E-Verify requirements of N.C.G.S. Chapter 64, Article 2. Vendors are directed to review the foregoing laws. Any awarded Vendor must submit a certification of compliance with E-Verify to the awarding agency, and on a periodic basis thereafter as may be required by the State.

Element451 understands and agrees to this.

3.4 SOLUTIONS NOT HOSTED ON STATE INFRASTRUCTURE

The Solution will be required to receive and securely manage data that is classified as High Risk.

Yes. Element451 can receive and securely manage data that is classified as high-risk. Please see our Data Management Policy in **Exhibit B**.

Refer to the North Carolina Statewide Data Classification and Handling policy for more information: https://it.nc.gov/document/statewide-data-classification-and-handling-policy.

Element451 has read through the NC Statewide Data Classification and Handling policy.

To comply with the State's Security Standards and Policies, State agencies are required to perform annual security/risk assessments on their information systems using NIST 800-53 controls. This requirement additionally applies to all Vendor-provided, agency-managed Infrastructure as a Service (IaaS), Platform as a Service (PaaS), and Software as a Service (SaaS) Solutions which will handle data classified as Medium Risk (Restricted) or High Risk (Highly Restricted) data.

Element451 performs annual security assessments. Please see our Risk Management Policy in **Exhibit C** to learn more.

(a) Vendors must submit a Vendor Readiness Assessment Report - Non-State Hosted Solutions with their Offer. This report is located at https://it.nc.gov/documents/vendor-readinessassessment-report

Element451 has included a copy of our VRAR in **Exhibit D**.

(b) Upon request, Vendors must provide a current independent third party assessment report in accordance with the following subparagraphs (i)-(iii) prior to contract award. However, Vendors are encouraged to provide a

current independent third party assessment report in accordance with subparagraphs (i)-(iii) at the time of offer submission.

Upon request, Element451 will provide this.

(i) Federal Risk and Authorization Management Program (FedRAMP) certification, SOC 2 Type 2, ISO 27001, or HITRUST are the preferred assessment reports for any Vendor Solutions which will handle data classified as Medium Risk (Restricted) or High Risk (Highly

Element451 has included our SOC 2 Type 2 certification summary in **Exhibit E**. We can provide our full SOC 2 Type 2 report with the signature of an NDA.

(ii) A Vendor that cannot provide a preferred independent third party assessment report as described above may submit an alternative assessment, such as a SOC 2 Type 1 assessment report. The Vendor shall provide an explanation for submitting the alternative assessment report. If awarded this contract, a Vendor who submits an alternative assessment report shall submit one of the preferred assessment reports no later than 365 days of the Effective Date of the contract. Timely submission of this preferred assessment report shall be a material requirement of the contract.

Element451 has included our SOC 2 Type 2 certification summary in **Exhibit E**. We can provide our full SOC 2 Type 2 report with the signature of an NDA.

(iii) An IaaS vendor cannot provide a certification or assessment report for a SaaS provider UNLESS permitted by the terms of a written agreement between the two vendors and the scope of the IaaS certification or assessment report clearly includes the SaaS Solution.

Element451 has included our SOC 2 Type 2 certification summary in **Exhibit E**. We can provide our full SOC 2 Type 2 report with the signature of an NDA.

(c) Additional Security Documentation. Prior to contract award, the State may in its discretion require the Vendor to provide additional security

documentation, including but not limited to vulnerability assessment reports and penetration test reports. The awarded Vendor shall provide such additional security documentation upon request by the State during the term of the contract.

Element451 understands this and will provide any documentation needed or requested by the State during the term of the contract.

3.5 ARCHITECTURAL DIAGRAMS

The State utilizes architectural diagrams to better understand the design and technologies of a proposed Solution. These diagrams can be found at https://it.nc.gov/architectural-artifacts and should be included with the Vendor's Offer.

Element451's Network Architecture Diagram can be found in **Exhibit F**. This is proprietary information and not to be released to the public.

There may be additional architectural diagrams requested of the Vendor after contract award. This will be communicated to the Vendor by the Agency as needed during the project.

Element451 understands this and agrees to discuss the diagrams needed.

3.6 REFERENCES

The Vendor must provide three (3) references from customers

> **a. for whom your Solution was implemented within the last three (3) years; and**
>
> **b. whose business processes are similar to NCCCS in terms of functionality, complexity, and transaction volume.**

For each reference, the Vendor must provide the following information:

<u>Reference No. 1</u>

Customer name: Forsyth Technical Community College
Customer contact name: Devin Purgason
Customer address: 2100 Silas Creek Pkwy, Winston-Salem, NC 27103
Telephone of a customer employee most familiar with the Solution implementation: 336.734.7230
Customer email address: dpurgason@forsythtech.edu
Time period over which each implementation was completed: 09/04/2020

Brief summary of the Solution implemented:

Forsyth Tech sought a CRM that would help it achieve a one-college recruiting model with a single, comprehensive solution for proactively collecting and managing leads. Key requirements included workflow automation, streamlined admissions, targeted marketing campaigns, and the ability to track results.

Workflows that automatically send communications to students have made the most significant impact to date. They've freed up valuable time for their admissions team by automating previously manual tasks. Having a centralized place for admissions data has modernized their operations as well.

How many touchpoints does it take to enroll a prospective student? At minimum 13! We invite you to listen to Paula Dibley of Forsyth Tech talk about how Element451 makes it possible to manage communications at such a scale: "It's like Magic."

List of offered Solution products installed and operational: Element451 is an all-in-one system. Forsyth Tech has our full CRM solution.
Number of vendor or technical staff supporting, maintaining, and managing the Solution: 5 or less, 68 total users
Number of end users supported by the Solution: 8,270 end-users
Number of sites supported by the Solution: 1

Reference No. 2

Customer name: Mayland Community College
Customer contact name: Jennifer Grindstaff
Customer address: 200 Mayland Dr, Spruce Pine, NC 28777
Telephone number of a customer employee most familiar with the Solution implementation: 828.467.0043
Customer email address: jgrindstaff@mayland.edu
Time period over which each implementation was completed: 06/03/2022

Brief summary of the Solution implemented:

Mayland Community College (MCC) was experiencing a seven (7) year decline in their enrollment and was looking for a solution that would help organically increase enrollment. MCC knew they wanted to provide a high-touch personalized communication experience for students in rural North Carolina. MCC also understood this meant MCC needed to shift to a digital-first approach to engage with prospective students in the digital-first world. MCC recognized this disconnect between themselves and prospective students, however; MCC had a staff of two to handle the work of a team of four to five. Enter, Element451.

Element451 provided MCC with all the necessary tools to engage meaningfully with prospective students in a digital-first world and Element451's AI-powered CRM streamlined the cumbersome, previously manual tasks to make the team of two feel like a team of four or five. MCC utilizes Element451's robust and hyper-personalized communication tools to create a personalized engagement experience for prospective students from the first point of contact through enrollment and beyond through the student lifecycle.

MCC also enjoys Element451's Packs, our pre-built customizable campaign library, to reach out individually and specifically to each individual prospective student. Our pre-built campaigns, and campaigns built by MCC are designed to ensure individual students receive the right information at the right time, and in the right channels.

List of offered Solution products installed and operational: Element451 is an all-in-one system. MCC has our full CRM solution.
Number of vendor or technical staff supporting, maintaining, and managing the Solution: 3 or less, 8 total users
Number of end users supported by the Solution: 783 end-users
Number of sites supported by the Solution: 1

Reference No. 3

Customer name: College of the Albemarle
Customer contact name: Kris Burris
Customer address: 1208 N Road St, Elizabeth City, NC 27909
Telephone number of a customer employee most familiar with the Solution implementation: 252.335.0821 ext. 2251
Customer email address: kris_burris76@albemarle.edu

Time period over which each implementation was completed: 07/11/2022

Brief summary of the Solution implemented:

College of the Albemarle (COA) was looking for a CRM that provided personalized communication tools, marketing automation, and reporting capabilities to help streamline the admissions process and provide COA users with critical tracking data. Element451 was the perfect system to not only fulfill all of what COA needed then, but also allow for COA to have room to grow.

COA was impressed with Element451's ability to truly service the entire prospective student lifecycle. From beautiful first-inquiry landing pages to personalized post-acceptance microsites, prospects are able to enjoy a seamless, fully-mobile experience.

Since implementing Element451, COA has seen the benefits of creating a more personalized experience for students that meets the students where they are in the enrollment process with proper messaging at the proper time, using their preferred method of communication.

List of offered Solution products installed and operational: Element451 is an all-in-one system. COA has our full CRM solution.
Number of vendor or technical staff supporting, maintaining, and managing the Solution: 3 or less, 12 users
Number of end users supported by the Solution: 2,314 end-users
Number of sites supported by the Solution: 1

3.7 CONTRACT TERM

A contract awarded pursuant to this IFB shall have an effective date as provided in the Notice of Award. The term shall be three (3) years and will expire upon the anniversary date of the effective date unless otherwise stated in the Notice of Award or unless terminated earlier.

Element451 will provide pricing based on this information.

The State retains the option to extend the contract term for two (2) additional one (1) year periods at its sole discretion.

Element451 will include pricing for two additional one-year renewal periods.

3.8 DELIVERY

For completion by Vendor: The Vendor will provide access to the SaaS Solution within ___3___ business days of the receipt of the purchase order.

If circumstances beyond the control of the Vendor result in a late delivery, it is the responsibility and obligation of the Vendor to immediately notify the Purchasing Agent listed on the purchase order, in writing, and specify the anticipated delivery date.

Element451 understands and agrees.

4.0 BUSINESS AND TECHNICAL SPECIFICATIONS

4.1 INTEGRATION AND COMPATIBILITY

a. Interface with the following applications:

i. Microsoft Office 365 applications

ii. Ellucian Colleague® (Unidata, NC Customized Version)

iii. Ellucian Banner®

iv. Ellucian Go® (Mobile Solution)

v. Modern Campus Destiny One®

vi. Blackboard LMS (Learning Management System)

vii. Moodle LMS

viii. CFNC (College Foundation of North Carolina)

Yes. One of the key advantages that distinguishes Element451 from its competitors is the seamless integration it offers with external solutions. This is particularly noteworthy in the case of bi-directional integration with Ellucian products, which is achieved through flat-file or API connections, including an open REST API. Integrating Element451 with NCCCS institutions's tech stack among individual campuses can be achieved by first evaluating each integration's specific requirements and the systems' capabilities. Our CRM can import data from multiple sources, and users can define import templates (schemas) via our drag-and-drop interface. Element451's highly efficient and flexible means of data transfer ensures a smooth and streamlined experience for its users, setting it apart as a valuable solution for higher education institutions.

Integration Details

At Element451, we take pride in our ability to offer the fastest implementation process in the industry. Our team works meticulously to plan and execute successful integrations between Element451 and external solutions, ensuring a seamless flow of data between the systems. This can be handled using one of the following integration methods:

Flat File

Our team at Element451 will set up and maintain an SFTP for NCCCS institutions, at no additional cost, to export data from Element451, on a schedule of their choice, that can be imported into Banner, Colleague, or another external solution. Our CRM can import data via flat file from multiple sources, and Element451 encrypts all data in transit and at rest.

Most commonly, the data exchange is implemented as a transfer of flat files on a scheduled basis through an SFTP server, where each NCCCS institution can dictate the specifications and frequency for the data exchange and where all of the value and code translation (for country codes, major codes, term codes, etc.) happens within Element451. Scheduled data passes can happen multiple times a day.

Flat file integration steps include the following:

1. Element451 and NCCCS institutions will Identify the data that needs to be integrated between Element451 and the external solution, such as student information, etc.
2. Element451 and NCCCS institutions will define the file format and structure for exchanging data between systems, such as CSV or TXT.
3. Element451 will configure our CRM system to export data in the defined file format and structure.
4. NCCCS institutions will configure the external solution to import data from the exported files into the appropriate database tables.
5. Element451 will test the data transfer process to ensure that data is correctly exchanged between systems.
6. Element451 and NCCCS institutions will establish a schedule for regular data exports and imports to keep the systems synchronized through data passes that can happen multiple times a day if needed.

API Connection

Element451 also offers API connectivity (additional cost if we build and maintain the integration, however; the API is open for our partners to use at no cost if they decide to build and maintain) for integrating with Banner or Colleague. Element451 provides an open REST API that allows for real-time, seamless integration. This will facilitate data sharing and exchange for a variety of purposes, including provisioning users and groups in both applications and generating reports that can be filtered by academic and demographic criteria stored.

As an example, an API integration with Ellucian Banner or Colleague would include the following steps:

1. NCCCS institutions will work with Element451 to configure the Ethos API keys using Ellucian Ethos as the connection.
2. NCCCS institutions configure Banner or Colleague to receive data from Ethos and map it to the appropriate database tables.
3. Element451 and NCCCS institutions will identify the data objects and fields that need to be integrated between Element451 and Banner or Colleague, such as data sources (terms, majors, degrees, etc), student information, and application data.
4. Element451 will define the mapping between the data objects and fields in Element451 and Banner or Colleague.
5. Element451 will configure the API integration to extract data from Element451 and push it to the appropriate Ellucian Ethos endpoints, which populates the table in Banner or Colleague.
6. Element451 will test the API integration to ensure that data is correctly imported into Banner or Colleague.
7. NCCCS institutions will configure change notification and Ethos endpoint for data that is sent to Element451.
8. Element451 will test API integration from Banner or Colleague to Element451 to ensure data is being imported correctly.
9. Element451 will configure workflow rules to determine the points at which records sync and handle Ethos matching errors.

Import/Export Capabilities

Data can be imported and exported from Element451 using either a flat-file or API connection available. Our connections allow data to be imported or exported from a variety of sources such as:

- Data imports support: Local File, SFTP, Dropbox, Google Drive, Amazon S3 and URL
- Data exports support: SFTP, Dropbox, Google Drive, Amazon S3, and Email Download Link

When setting up a data import or export, columns can be skipped or mapped to a standard field, which allows for selecting either name, value, or custom codes for applicable fields, or a calculated field, which allows for formulas to be used to verify and transform data before being imported or exported. When importing, Element451 supports direct and fuzzy matching of contact records as well as testing data imports to ensure that the data is correctly handled before performing an import. When exporting data, rows can be repeated based on applications, decisions, education, etc. as needed. Import and export tasks can run immediately or be scheduled for specific dates and times.

Implementation Data Plan (with both connection types)

During the implementation phase, every institution follows a customized plan and integration schema. The Customer Success team will help NCCCS institutions determine the details and data mappings during the integration process.

The majority of integration work is typically concentrated in the final three weeks. The total duration of this process can range from three to five weeks, depending on the complexity of the integration itself, such as whether it involves a flat-file or API integration and whether the API connection is built by Element451 or the NCCCS institution. With an API connection, real-time information sharing between Banner or Colleague and Element451 is possible, whereas flat-file integration involves information sharing at scheduled intervals according to the institution's specifications. At Element451, we remain committed to providing a seamless and efficient integration experience, and our team of experts will work closely with our clients to ensure that the process is executed with the utmost precision and attention to detail.

Element451 interfaces with the following systems and applications:

- Banner (Ellucian)
- Colleague (Ellucian) (Unidata, NC Customized Version)
- CFNC (College Foundation of North Carolina)
- Blackboard LMS
- Moodle LMS
- Modern Campus Destiny One
- Brightspace
- Microsoft Office 365 applications, including Outlook, Word, and Excel (import/export .csv files)
- SONIS (Jenzabar)
- Jenzabar 1
- Jenzabar EX
- Populi
- Peoplesoft
- Ellucian Go (MobileSolution)
- Collegix (Aptron)
- EDLumina
- Campus Nexus (Campus Management)

- CAMS (Unit4)
- Campus Cafe
- CAS
- Homegrown Student Information Systems
- Others

Integration Resources

To learn more about our integration capabilities, please see this link to information on our website: https://element451.com/product/integrations. We also have a full integration guide that can be accessed at https://integrations.element451.com/.

Element451 is committed to providing exceptional customer service and support throughout the integration process. Our dedicated team will work closely with you to explore all options and determine the necessary scope of integration work. You can count on us to guide you through every step, making the process less daunting and ensuring a seamless partnership with Element451.

b. Compatible with mobile devices (phone, tablet, laptop, etc.)

Yes. Element451 is accessible via laptops, PCs, mobile devices, and tablets. Element451 is built with a responsive design, so it automatically formats to any size or shape based on an individual's device. This holds true for both the internal institutional interface and the external/student-facing components (emails, landing pages, application portals, microsites, event pages, registration, etc.).

For example, say an individual arrives at an institution's campus fair and stops at check-in but realizes they have not yet registered. The individual can easily register for the event on-site through their mobile device. Or perhaps a tablet that the NCCCS institution has handed them to fill out their information. This data automatically creates an individual's profile or appends one (with updated information). In real-time, using any device, the institution can seamlessly use Element451's CRM solution to manage individuals and their data.

4.2 COMMUNICATION

a. Enable two-way email and SMS communication between staff and students/parents

Yes. NCCCS institutions will be able to create beautiful, institutionally branded, personalized emails that help set each institution apart - and there are several ways to do this. We offer a no-code email/SMS campaign drag-and-drop builder, a library of "Packs" (pre-built email/SMS campaigns and workflows that can be edited further), and an AI Copilot that writes campaigns for NCCCS institutions.

Element451's no-code, drag-and-drop campaign builder offers full-featured email and SMS management with the ability to edit and customize to each institution's needs. When composing an email or SMS communication, users can choose from a template to follow or customize right from the start. If a template is chosen to start, you still have the ability to edit and change things around within that template. With Element451, you can easily add the following customizable blocks to any email communication:

- Row
- Separator(s)
- Header
- Introduction
- Call to Action (CTA)
- Column
- Signature
- Footer
- List(s)
- Quote(s)
- Bodies

NCCCS institutions can brand your email, including using school colors, editing fonts, and adding or subtracting images (with the ability to size, crop, etc.).

To automatically incorporate personalization into each communication, Element451 captures "tokens," which is simply an identifier from a piece of information that you've captured that you want to apply or use within your messaging. Examples of a token can be facts about one of your colleges or an individual's name. Additional customization can be found through audience segmentation or dynamic content, as described below:

- Audience Segmentation: Send emails to prospective students based on characteristics like their academic interests, intended start term, location, as well as things they've done, i.e., visited a landing page, clicked through a previous email.

- Dynamic Content (Advanced Personalization): Automatically create multiple versions of an email by identifying individual content elements (image, sentence, paragraph, CTAs) that should change based on who is receiving the message.

Beyond branding and tokens, Element451 will automatically create multiple versions of the same email that are custom-configured by each NCCCS institution for individuals based on the information collected within Element451.

For example, say a female applicant is applying to an institution's Marketing program, and the applicant has filled out an RFI to learn more about the program. The institution might want to send an email that showcases the women in that specific program in the follow-up email based on customization options built out by the institution's staff. Since the applicant has identified themselves as female, the photographic content of the email could feature more women in the front and center of the images to help the student picture themselves in your program. Another feature of the personalized email is the content. NCCCS institutions can create a variety of student spotlights to feature in their emails. For this example, the student spotlight might focus on a current female student and their journey as a part of the Marketing program. Multiple versions of this same general email, an email about an institution's Marketing program, can be created for all demographics the institution is trying to reach with the clicks of a few buttons. This allows your team to make a huge impact by helping all individuals see themselves as a part of one of NCCCS's campuses.

Today's digitally-savvy students expect this level of personalization, and it is essential to help applicants visualize themselves as a part of your campuses. Communication campaigns can explore topics from general information about an institution's research opportunities and programs, honors programs, major-specific class sizes, professor profiles, opportunities for first-year students, campus culture, and more about your campuses. These campaigns can also be used to showcase the many benefits of attending a specific institution and the benefits of attending a community college as opposed to a university. Showcasing an institution's curriculum and the wide range of course offerings that can be tailored to each student's individual interests can help applicants feel like they have the power to make their college experience and education their own. Institutions can also emphasize specific internship opportunities, career placement, extracurricular activities, and other unique aspects of their campuses. NCCCS institutions can emphasize the prestige of the programs, degrees/certificates, and learning experiences each school offers that are unmatched by other institutions.

A sample campaign could reflect the following:

Campaign Call to Action

Apply

Personalization for Students

Based on organizational grouping: First-year applicants

Personalization Opportunities for Your School

NCCCS institutions can create a set of emails, SMS/MMS messages, or a combination of emails and SMS/MMS messages to send to targeted students

- Email 1
- Email 2
- SMS 3
- Email 4
- SMS 5

Topics Covered

- Introductory email providing history and overview of the NCCCS institution

- Majors, unique course offerings, and other programs
- Spotlight on a current student in the applicant's specified major
- Internship opportunities, study abroad opportunities, and other extracurricular activities
- How to apply and scholarship information

NCCCS institutions can preview how the email(s) or SMS texts will look on different device types, such as a mobile phone, a tablet, or a desktop. Once you are finished creating your email, you have the ability to go in and test it to make sure it works for your students.

Scheduling, testing, and reporting functionality include:

- Scheduled Sending: Set emails/texts to send at future dates and times.
- Automated Sending: Automatically send an individual email/text or kick off an email/text series when a prospective student submits an information request, downloads a landing page document, etc. Email triggers also include label changes, i.e., suspect becomes a prospect.
- Drip Campaigns: Set a nurture email series to automatically send at certain intervals.
- A/B and Multivariate Testing: Test versions of subject lines, message content, and sender name. The best-performing one will automatically be sent to the percentage of the audience you identify.

Additionally, we are the only CRM to offer "Packs," which are pre-built campaign templates, offering administrators several options of campaigns to choose from, and each individual step within those campaigns (workflows) is already set up within the pack. You can immediately launch a campaign and begin connecting with groups like high school seniors, potential graduate students, transfer students, etc. You'll benefit from our 25+ packs by saving the valuable time that it takes to write, design, and develop multi-channel campaigns. Examples of Packs include:

- Decision Announcement Pack
  - Fun, creative messages to welcome accepted students to their institution
- Application Checklist Campaign
  - Pre-built messages to help encourage application submission and increase application yield
- Newsletter Email Templates
  - Keep prospective and current students up-to-date on their individual programs
- Event Invite Templates
  - Send admitted students personalized invites to campus to help them make their decision
- And many more
  - To learn more about Packs, follow this link https://element451.com/product/content

Lastly, Element451 offers Bolt Copilot, your in-application AI assistant. Bolt Copilot can create campaigns and landing pages, write messages, correct grammar, and more. With Copilot, institutions can create and deliver compelling content faster and easier than ever and reach the highest levels of operational efficiency. In particular, Copilot's Campaign Builder feature delivers unmatched value to our partners. It uses generative AI to automate the crafting of marketing campaigns. Users can initiate campaign creation by simply asking, "What can you create for me?"

If an institution expresses an interest to "Create a campaign targeting high school students for dual enrollment," Copilot will gather further essential details, which might include the target audience, goals, preferred channels (such as email or SMS), and campaign duration. Then, Copilot will return a comprehensive multi-channel campaign outline rooted in industry best practices. Each proposed communication, whether via email or SMS, is meticulously structured, with recommended subject lines, introductions, body content, calls to action, and conclusions. These messages are enriched with intuitive imagery and potential calls to action,

drawing from each institution's extensive knowledge base and tokens to ensure maximum personalization. Copilot knows that an SMS should be shorter and more casual than an email, and creates unique versions of each communication specifically for SMS, even including emojis when suitable. Once Bolt Copilot's Campaign Wizard has created the campaign, NCCCS institutions can tailor the content and timeline as desired.
In minutes, Copilot can create compelling, personalized campaigns like:

- Spotlighting specific academic programs
- Engaging MBA alumni for flagship scholarship contributions
- Dual enrollment campaigns targeting particular high schools
- Promoting events such as a Cultural Fair Celebrating Campus Diversity
- Outreach initiatives for parents
- Matriculation campaigns for incoming freshmen
- Awareness drives for campus safety and wellness programs
- Campaigns introducing new faculty or guest lecturers
- Promotions for summer or winter special courses
- Enrollment reminders for continuing education or adult learning programs

In the evolving landscape of higher education CRM systems, Bolt Copilot, including its Campaign Wizard, sets Element451 apart. Bolt Copilot was designed to address the challenges of staff shortages and expertise gaps. AI is not just about automating processes; it should empower institutions to drive engagement and results in ways previously unimagined, ultimately creating a meaningful, positive student experience.

Real-time analytics will be connected to all campaigns and can be viewable at a glance on your user dashboard. Element451 is able to monitor individual and overall campaign performance from either a default or custom dashboard. These dashboards are easy to understand, clear, and shareable within each institution. The information is pertinent to understand what campaigns are working well and what campaigns can use a refresh, allowing end users to utilize their valuable time in an effective way. NCCCS institutions will have the ability to track communications across modalities, store history, and provide message history views for both faculty and students.

Within each campaign, some metrics you can view include:

- Emails/SMS Sent
- Emails/SMS Delivered
- Emails/SMS Opened/Percent Rate
- Unique Opens
- Clicks/Click Percent Rates
- Unique Clicks
- Bounced Percentage
- Unsubscribed Percentage

With Insights451, metrics are taken a level further by tracking:

- Audience type
- By subject
- By performance
- By type
- By campaign

So, for example, by mixing the two types of information, institutions could track "Open Rate by Type and Audience" or "Click Rate by Type and Audience."

Users can filter reporting by user-created campaign tags, individual campaigns, and the desired date range. Our Insights451 reporting provides delivery, open, and click counts and rates at the campaign and tag level, further differentiating between one-time, segment-based emails and ongoing, workflow-based emails. We present this data in multiple visualizations, making it easy to measure the effectiveness of individual campaigns relative to others and identify trends over time within tags and ongoing campaigns.

Element451's metrics apply to both email and SMS/text messages. Each and every communication is stored within Element451. Analytics are broken out by individual communications as well as aggregated communications. With a full communication history, all in one place, NCCCS institutions will be able to see which communications are most successful and which aren't. They can figure out the "why" and forecast what is making their communications successful or not as successful.

Communications can go to prospects, students, former students, alumni, parents, and various segments. NCCCS institutions cannot send email/SMS communications to staff unless they are not end users in Element451.

b. Create mailing lists for campaigns, mass distribution, targeted distribution

Yes. NCCCS institution users can create various targeted mailing lists for multiple campaigns and mass communications distribution. These lists can be created based on any trait captured and stored within Element451. This can mean any demographic information such as geographic location, current high school, area of study, proclaimed major, extra-curricular activities, and more. Using these traits collected in Element451, NCCCS institution users can create more personalized, targeted, and meaningful communications that can be sent to the right audience at the right time, increasing overall engagement levels. Audience segmentation and targeting ability are key for marketing automation. Content in communications such as emails and SMS as well as landing pages, can be customized to specific audience segments. Segments can be based on geography, for example, a potential student's distance from campus or attributes like academic interests.

When it comes time for audience segmentation, let's use an example. Say you are the Dean of the Nursing Program, and your goal is to get out specific information to a segment of Nursing students before they ever reach campus. Let's imagine you start with a list of 2000 students in Element451. Now let's say you are looking to target individuals that have been admitted but have yet to accept their admissions package. You want to keep these individuals moving along down the funnel (your behind-the-scenes marketing workflow). You would find the segment entitled "Admits Who Have Not Accepted" narrowing your search down. Again, you are only looking to find those recruits interested in Business as their major. So within the segment, you can filter by "Active Major." Your search has narrowed in number yet again. You are now at the core of your campaign target. Essentially in this process, both the admissions team and the academic side of the college have partnered in marketing efforts.

With the example above, if you plan to use this entire segment again, you can simply create your own segment by clicking "Save As New Segment." You will never have to recreate this particular segment again, and it is easily accessible to be used as needed.

Within Element451, users can quickly access an individual's level of interest and engagement with the institution and leverage that data for ongoing marketing and communications. Under the "Traits" tab on an

individual's profile, users can access the student's engagement level/score (i.e., lurker or fan), which is based on actions of the student such as opening NCCCS institutions' emails, submitting RFI forms, registering for events, responding to an email or SMS message, etc.

All of these actions are also captured under the "Activity" tab, which highlights every email received, clicked, opened, events registered for and attended, forms submitted, plus applications started and submitted. All of these activities and traits can be used to trigger the student's enrollment in workflows or communication plans specific to their level of interest and engagement with the institution.

Students can be added to multiple segments, meaning they can be added to multiple campaigns at any time. Every time a student fills out another RFI form or takes another step through the enrollment process, they can be moved to a new segment based on their position in the enrollment funnel and beyond as an enrolled student.

4.3 APPLICATION LIFECYCLE

a. Enable staff to identify and group students by status (i.e., prospect, applied, enrolled, enrolled at census)

Yes. Each NCCCS institution's administrators can quickly access an individual's status, such as prospect, applied, enrolled, etc. Segmentation can take this further, such as identifying prospects by intended term or enrolled by year. Further, labels (including custom) can identify individual traits even more granularly.

With this information, NCCCS institutions can recruit, perform outreach, onboard, and track the entire student lifecycle. This includes prospective students, former students, current students, and alumni. No other applications or extensions to our platform are needed. Each NCCCS institution staff member will be able to access any student record within the limits of their permissions, ensuring anyone can pick up with an individual where the last staff member left off (view their previous engagement, view notes on the individual, view last communications, view attended events, etc.). Within the Bolt Profile, NCCCS Institution users can review what stage of the student lifecycle an individual is in based on their level of engagement and their completed activities in Element451.

Efficient communications and processes are the core of our success within colleges and universities. NCCCS institutions will have personalized, automated (and/or manual, if desired) custom communications and workflows. This allows the administration more of what everyone needs - time, all while keeping individuals interested and engaged. Information on any individual is housed in a single user interface (UI) within Element451. Individuals will have an extensive audit trail attached to their record, leaving no need for guessing. Any staff member located in any department, at any campus (if multiple campuses apply), with the proper permission (set in Element451 by administration), will be able to access records. Having all of your information in one place allows for cohesive, clear, consistent communication between individuals and NCCCS institution staff members.

Below, recruiting, outreach and onboarding stages of the student life cycle are showcased with examples of how Element451 could be used:

- Prospect
    - Attract - using multi-channel, personalized, automated, custom communication campaigns, workflows, and events
    - Contact - using multi-channel, personalized, automated, custom communication campaigns
    - Visit - events module allows a prospect to sign up for a visit or for the NCCCS institutions to host a larger event for several prospects
- Inquiry
    - Landing page Request for Information form
    - Boltbot communication
    - Contact information on a microsite introducing individuals to the NCCCS institution
    - Workflows used to give prospects "pushes" to fill out an application form; multi-channel, uniform, and customized messaging abilities
- Application
    - Apply - Customized, institutionally-branded application forms, step-based instructions with a checklist, autosave components to pick up right where an individual left off, autofill components based on a prior RFI that was filled out or an event that was signed up for,

workflows provide "pushes" for applications that were started but not finished to be complete
- ○ Visit - events module allows an applicant to sign up for a visit or for the NCCCS institution, personalized, automated, custom communications can get applicants in touch with their recruiter or assigned counselor
- Admission
    - ○ Enroll - once a prospect is officially enrolled, they can be provided the next step, multi-channel communications via campaigns and workflows
    - ○ Orient - events module allows an applicant to sign up for a visit or for the NCCCS institution, personalized, automated, custom communications can get applicants in touch with their recruiter or assigned counselor
    - ○ Arrive - all student's information is tied to their record in Element451, allowing for questions and requests from parents, students, or other departments to be responded to by any staff member (with permissions to view) of the NCCCS institution; all information is consolidated into one place
- Financial Aid
    - ○ Personalized microsite with Financial Aid information and next steps guidance (checklists)
    - ○ Personalized, automated communications reminding individuals of upcoming payment

NCCCS institutions can move individuals through the enrollment funnel based on their engagement score and the different milestones each individual reaches. For example, when an individual fills out an RFI form, they become an inquiry. As they fill out an application, they become an applicant, and so on. Each activity an individual completes is tracked within the activity tab in the individual's Bolt Profile. Each NCCCS institution user can easily see where in the student lifecycle an individual is, as well as what workflows they have been enrolled in, what segments the individual has been added to, and more. Element451's Bolt Profiles paint a clear picture of where the individual is in their own student journey.

b. Provide a single portal for submitting applications that:

Yes. App451 is our highly configurable application builder and management module and offers a no-code-required way to create mobile-friendly applications for admission to each NCCCS institution. Each NCCCS institution will have the ability to create custom fields. These custom fields can be conditional only to display further questions if a certain answer is selected.

If certain fields apply to one specific application, the application can easily be copied and saved in another version. For example, suppose an NCCCS institution creates an application for its Associate Degree in Nursing (AAS) and wants to use similar, but not the exact, questions for its Medical Assistance Degree (AAS). In that case, the NCCCS institution can create a copy of the initial application for its Associate Degree in Nursing (AAS), rename it, and adjust it as needed to customize it for its Medical Assistance Degree (AAS).

NCCCS institutions can have multiple application types (i.e., first-year applicant, transfer, etc.) and make them accessible to individuals in a single portal where they can choose which type they would like to complete. Applicants can also have multiple applications using the same account. Applications have to be unique by application type, program, and term. When individuals login to their application portal, applicants can see the progress and status of each application. Common fields like address, education, and non-application-specific fields are shared across applications and automatically filled in when a new application is started. Communications can be scoped to a specific application. In addition, tokens and dynamic content can have the context of a specific application.

Each NCCCS institution can set application requirements based on a combination of attributes. They are step-based and autosave applicant information, among other modern features potential students are used to in their online experiences. Validations and error checking happen in real-time. Applicants are guided to the required fields if they miss one.

Progress completion is updated at the section and application levels for a better experience and more feedback. Help sections are included in the sidebar for the steps of an application where Element451 can display instructions, requirements, and other text. Additional text/markdown fields can be used in the flow of the application to provide more guidance. These fields can be controlled by conditional logic as well. Element451 will save all information from existing applications to the prospective student record.

During the application process, individuals have direct chat access anywhere in the application portal to connect with NCCCS institutional staff with questions or get assistance in real-time without an email or a call. Chat messages filter through to counselors and can be viewed and shared cross-functionally to ensure the student has a seamless experience and gets the information they need without jumping through hoops or encountering blockers. Element451 helps you make the experience as frictionless as possible for the applicant. Ultimately, this leads to increases in application completion and submission rates.

After submission, NCCCS institutions can distribute, review/score, and manage all applications (for example, if one needs a hold). NCCCS institutions can create a custom review workflow that enables collaborative decision-making and expedited review processes. Application reading and decisioning are part of the Decision451 module. It's simple to set up the Decision tools to follow a strategy that works best for each NCCCS institution to move different application types through various stages of review. You can establish acceptance or hold criteria, assign people to groups of applications, and otherwise facilitate a streamlined process that can vary based on application type. People can make and review comments and easily access everything they need to evaluate an application, including test scores, supporting documents, transcripts, and other supporting materials. NCCCS institutions can send personalized acceptance materials automatically to admitted students through the Decisions module when a final decision is made.

Post-submission, application status, recommendation submission statuses and checklists are available and attached to each individual's record. Those at NCCCS institutions with the appropriate permissions will be able to view this information at any time.

i. Allows applicants to upload documents (test scores, transcripts, etc.)

Yes. Element451 allows individuals to securely upload their documents in .pdf, MS Office, .jpg, text, images, and other formats to be added to the individual's contact record and/or application. NCCCS institutional staff can also drag and drop documents into the individual's account. These can be uploaded directly into the individual portal and accessible in the individual profile for NCCCS institution users to review and access at any time. There are no limitations on the amount of and type of documents stored. The system automatically converts compatible documents to .pdfs to protect an individual's uploads. Documents are viewable among various devices such as desktops, laptops, tablets, and mobile devices. Each upload field can be configured to accept specific documents if NCCCS institution desires.

ii. Utilizes prompts to ensure that fields are completed correctly

Yes. NCCCS institution staff will build, add, or modify questions by defining questions and marking them as required or not required. When a question is marked as required, the individual cannot complete and

submit the application until the question is answered properly, ensuring fields are completed correctly. Element451 will notify individuals if their application has not been completed in full.

iii. Directs applicants to pages on the college's website for additional information

Yes. During the application process, individuals have direct chat access anywhere in the application portal to connect with NCCCS institution staff with questions or get assistance in real-time without an email or a call. Chat messages, whether through Boltbot or our live chat, can filter through to counselors and can be viewed and shared cross-functionally to ensure the student has a seamless experience and gets the information they need without jumping through hoops or encountering blockers. Boltbot can automatically prompt an individual to go to a landing page or the NCCCS institution's website for additional information. In live chat, NCCCS institution staff can prompt the individual to go to a page. Element451 helps you make the experience as frictionless as possible for the applicant. Ultimately, this leads to increases in application completion and submission rates. Additionally, the application itself can prompt the visiting of a page, as well as personalized email and SMS campaigns, that are nurturing application submissions.

iv. Sends notifications to students and staff regarding action items

Yes. Element451 will automatically send students and staff communications (email or SMS communications) regarding action items needing to be taken by the student or staff member. Workflows can be created to automatically send individuals a form of notification, based on their communication preference types, designed to alert individuals of an impending task needed to be completed. For example, if an applicant needs to upload their transcripts, a follow-up email can be sent to the individual upon submission of their application alerting the individual of their outstanding task. After a certain amount of time, if the task has not been completed, another follow-up email can be sent to the individual to remind them of the task. This can continue until the individual takes the action. A follow-up email can be sent thanking the individual for completing the outstanding task.

Internally, task assignment and management within Element451 is designed to help streamline the completion of tasks for both the NCCCS institution and your individual users. The creation of tasks, just like other features of Element451, is entirely customizable around the desired workflow of the NCCCS institution, ensuring better overall adoption of Element451 and enabling NCCCS institution users to more efficiently manage their tasks and, ultimately, time.

Element451's Tasks module is centered around four core product principles: productivity, personalization, intelligence, and connectivity. Tasks can be created with extensive customization, such as multiple assignees, prioritization categorization, and status. This means an entire department can be assigned to work on a specific task. The goal of the Tasks module is to keep NCCCS institution users focused directly on building relationships with individuals in an order that best reflects the needs of each NCCCS institution and your business practices. Enabling an increase in productivity and efficiency, we have designed tasks to be customizable for both the NCCCS institution as a whole as well as the NCCCS institution's individual users. NCCCS institutions will be able to customize:

- Statuses
    - Add interim labels that provide more detail than a to-do, in progress, and completed (i.e., waiting for response, almost complete, etc.)

- ■ Leverage specific statuses to provide more context surrounding the progress of a task and its completion
- ○ These can be updated and changed at any time
- ○ Choose language that best reflects the NCCCS institution and the language you use daily

- Priority Scaling
  - ○ Rank assigned tasks in individual order of importance and urgency to be completed with customized categories
  - ○ This is customizable for NCCCS institution users both on an institutional level and individual level
  - ○ Choose from endless color, icon, and labeling options to best reflect individual organizations as well as each NCCCS institution's current process
- Detailed Task Creation
  - ○ Add multiple assignees to tasks
  - ○ Create subtasks to be completed, in a specific order, before a larger task can be considered complete
  - ○ Add Subscribers who want to be kept in the loop on the progress of a certain task when they are not directly responsible for the completion of a task

Queues are another feature within Element451 to further encourage greater task management and completion for NCCCS institution users. Queues can be used in the same way a folder and a filter would be used to organize and search for tasks within Element451. Queues outline and organize tasks for both individual and all NCCCS institutional users to see in an easy-to-read sidebar window. These lists show the most up-to-date information, as once a task is marked complete, it disappears from all Queue lists. All tasks (tasks with individual or multiple assignees, task types, etc.) are displayed in the Queue and accessible for users to help evaluate the prioritization of tasks.

For daily and individualized management of task completion, Element451 also offers a Task Mode feature that creates a sticky bar at the top of the page. In the sticky bar, NCCCS institution users will see the specific tasks they have assigned for the day and will be able to mark each task as completed as they move through the tasks. The sticky bar will stay at the top as NCCCS institution users continue to move through Element451, keeping users from having to open multiple tabs to continue using the system and to see all the parts of the assigned task they are completing.

Say a new task has been assigned to an individual for the day while they are working on another task; instead of having to go back to the Task page to get more information, they simply can click on the name of the task and view all the information that would be available in the Tasks Module, about the task (i.e., subtasks to be completed, assignees, due date, priority, etc.). Tasks can also be edited from this expanded view and will update automatically within Element451. The Task Mode feature further reduces the number of clicks necessary to work in Element451 and is designed to help NCCCS institution users streamline the completion of tasks with less time focusing on the functionality of the system itself.

v. Tracks actions taken in response to notifications

Yes. Element451 tracks all actions taken in response to notifications. For applicants, this is in the activities tab on the individual's profile. This tab highlights every email received, clicked, opened, events registered for and attended, forms submitted, plus applications started and submitted. These activities and traits can trigger the next step in the enrollment workflow or application process.

Internally, task assignment and management within Element451 are designed to help streamline the completion of tasks for both NCCCS institutions and your individual users. The creation of tasks, just like other features of Element451, is entirely customizable around the desired workflow of the NCCCS institution, ensuring better overall adoption of Element451 and enabling NCCCS institution users to more efficiently manage their tasks and, ultimately, time.

Element451's Tasks module is centered around four core product principles: productivity, personalization, intelligence, and connectivity. Tasks can be created with extensive customization, such as multiple assignees, prioritization categorization, and status. This means an entire department can be assigned to work on a specific task. The goal of the Tasks module is to keep NCCCS institution users focused directly on building relationships with individuals in an order that best reflects the needs of NCCCS institutions and your business practices. When that task is complete, it will appear completed in the task module.

vi. Allows applicants to check the status of an application

Yes. Post-submission, application status, recommendation submission statuses, and checklists are available and attached to each individual's record. Those at each NCCCS institution with the appropriate permissions will also be able to view this information at any time.

vii. Provides customizable workflows to process applications

Yes. Element451's decision module is powered by workflows and designed based on each NCCCS institution's specific and unique needs. Each campus can create its own individual review process based on admissions requirements for all individual programs, admissions requirements, and any other aspect of the decision process a campus would like individualized. After application submission, each NCCCS institution can distribute, review/score, and manage all applications (for example, if one needs a hold). Each NCCCS institution can create a custom review workflow that enables collaborative decision-making and expedited review processes. Application reading and decisioning are part of the Decision451 module. It's simple to set up the Decision tools to follow a strategy that works best for each NCCCS institution to move different application types through various stages of review. You can establish acceptance or hold criteria, assign people to groups of applications, and otherwise facilitate a streamlined process that can vary based on application type. People can make and review comments and easily access everything they need to evaluate an application, including test scores, supporting documents, transcripts, and other supporting materials. NCCCS institutions can send personalized acceptance materials automatically to admitted students through the Decisions module when a final decision is made.

Post-submission, application status, recommendation submission statuses, and checklists are available and attached to each individual's record. Those at NCCCS institutions with the appropriate permissions will also be able to view this information at any time.

viii. Complies with Section 508 of the Rehabilitation Act

Yes. Element451 is fully 508 compliant. Web accessibility check tools can be found at https://www.digitala11y.com/accessibility-plug-ins-ie-chrome-firefox-browsers/. Element451 uses Siteimprove and WAVE. Element451 complies with WCAG 2.0 AA and 2.1 AA standards (see **Exhibit G** attached for our VPAT).

4.4 EVENT MANAGEMENT

a. Enable staff to schedule online information sessions, campus tours, etc.

Yes. Element451 makes it simple to create and manage online and on-campus events of all types. This includes online information sessions, campus tours, and more. Administrators can define and customize event pages to market, register attendees, and track attendance. NCCCS institutions can auto-create Zoom meetings and track who attended without manual work. If your event is in person but limited to a small group, you can efficiently cap the number of RSVPs and their guests. QR codes are also available for event scanning.

NCCCS institution users can quickly pull a pre-created event registration template, customize it with additional fields, or create their own with our easy form builder. Registrants can sign up on any type of device, from laptops to smartphones. Users can define and customize event pages to market upcoming events (customized automated communications), register attendees, and track attendance.

We've designed our event sites to make finding and registering for an event as easy as possible. In addition to your homepage, site visitors can explore event listings on your event calendar - a helpful feature so prospects can see many events at once and plan for things like campus visits and tours. The calendar displays each event on the day it's scheduled, and in the order, it will occur. When someone hovers over an event on the calendar, event information, such as the time, appears. Site visitors can also click through to upcoming calendar months to see what's happening in the coming months.

Element451 saves all data when a person clicks on a link to visit an event page or registers for and attends an event. This way, users can create segmented workflows to send targeted messages to remind attendees of upcoming events, provide directions to campus, or thank people for attending an event in the past.

To see one of our partner schools' events page, please visit https://visit.villa.edu/.

With Insights451, NCCCS institutions can view event analytics for analysis and reporting post-event. NCCCS institutions can report on one specific event or events aggregately. Some examples of reporting that can be viewed with Insights451 include:

- Recent and Upcoming Event Registration
  - Attended, Canceled, No Show, Registered
  - Graph Visual
- Attendance to Registration Rate
  - Value, Target, Percentage
- Top Events with Most Registrants
  - Event Name
  - Number Registered
- Recent Events
  - Date, Event Name, Event Type, Registered, Attended, Canceled, Show Rate Percentage, Prospects, Applicants, Admits, Deposits, Enrollments
- Upcoming Events
  - Registered, Canceled, Prospects, Applicants, Admits, Deposits, Enrollments
- Events Efficiency
  - Attended, Canceled and No Show Percentages
  - Graph Visual

- Events Performance by Event Type
    - Event Type (adult learner, college fair, virtual information session, etc.)
    - Event Name
    - Event Date
    - Registered, Attended, Canceled, RSVP %, Prospects, Applicants, Admits, Deposits, Enrolled
- Events Performance by Student Term
    - Event Name
    - Active Term
    - Registered, Attended, Canceled, RSVP %, Prospects, Applicants, Admits, Deposits, Enrolled

With event metrics, you can filter by "Number of Recent Weeks to Include," "Number of Upcoming Weeks to Include," and "Event Name." NCCCS institutions can also have a unified view of students via customizable dashboards, which can be configured to showcase reporting. At-a-glance metrics that can be featured on each NCCCS institution's dashboard include reporting on events.

NCCCS institution users can also benefit from Element451's appointment-setting feature. NCCCS institutions have the ability to use enterprise-wide calendar functionality that can be used for events, individual meetings, or appointments with specific faculty, staff, or other stakeholders. The appointment data will integrate with personal calendars.

b. Send automated reminders to students and staff about upcoming events

Yes. Element451 saves all data when a person clicks on a link to visit an event page or registers for and attends an event. This way, users can create segmented workflows to send targeted messages to remind attendees of upcoming events, provide directions to campus, or thank people for attending an event in the past. Any specific workflow can be designed to send reminders to students and individuals about upcoming events. These reminders can include directions to campus, important seating information, or can just be a general reminder based on the NCCCS institution user's specific needs for each event. These reminder workflows can be customized to the specific event as well. These workflows can be updated and changed at any time.

4.5 REPORTS AND ANALYTICS

a. Provide dashboards on activities completed and real-time data for activities in progress

Yes. Element451 has native analytics reporting dashboards within our Insights451 module (out of the box, and filterable). Sharing information and insights is vital to each institution's team and each institution's success. ***With unlimited Insights451 reader seats included in our platform pricing, the cost is never a barrier to getting invaluable data to teams***. Our Insights451 module consists of the following analytics dashboards - Campaigns, Funnel, Events, Tasks Performance, Sources, Conversations, Web Activities, Appointments, and Management. Each of these analytics dashboards has drill-down capabilities alongside more general data presentations. Each report and dashboard is exportable and can be shared across departments or with people outside your institution. In addition, NCCCS institutions will also have Insights Q, our natural language query tool.

Campaigns

By leveraging the campaign dashboard, NCCCS institution users will have greater insight into the success of specific marketing campaigns, email and SMS performance, and the engagement level of different segmented and tagged groups. This enables NCCCS institutions to make informed decisions on marketing campaigns, communication effectiveness, and overall, see how Element451 is making a difference.

Tabs are divided into campaigns, segments, and tags, each with its own visualizations and graphs:

- Campaigns
  - Email Performance
    - Easy-to-Interpret percentage graphics showcasing sent, open rate, click rate, click-through rates, and year-over-year comparison
    - Line graph tracking trends based on an institution's specified period of time to track email campaign effectiveness over time
    - The email performance table tracks individual emails by name, NCCCS institutions can configure the table to showcase information needed to see how students are engaging with different types of emails received
  - SMS Performance
    - Easy-to-Interpret percentage graphics showcasing sent, open rate, click rate, click-through rates, and year-over-year comparison
    - Line graph tracking trends based on NCCCS institutions specified period of time to track email campaign effectiveness over time
    - The SMS performance table tracks individual SMS messages by name, NCCCS institutions can configure the table to showcase information needed to see how students are engaging with different types of SMS messages received
- Segments and Tags
  - This will help NCCCS institutions understand the effectiveness of a marketing campaign that is designed for a specific group of individuals
  - Both the Segment and Tags tabs are broken down by email performance and SMS performance

- These tabs capture the same information from the campaigns page, but the information is organized based on an institutions-selected segment or tag

Funnel Stages

The funnel dashboard evaluates the milestones students complete through the admissions to the enrollment process. Tabs allow for an overview of any specific part of the funnel stage (i.e., prospective, admitted, enrolled, etc.) and how current progress compares to previous terms or years. This dashboard also provides insight for NCCCS institutions to understand the demographics of its students. Tabs are divided into term comparison, academic year comparison, and a dimensional table, each with its own visualizations and graphs:

- Term
  - Colored arrows clearly demonstrate funnel stage trends
  - Line chart to display term-to-term trends
  - Cumulative bar chart to show term-to-term trends based on custom information filtered by NCCCS institutions
  - Point-in-time visualizations (i.e., Fall 2022 and Fall 2021) with easy-to-interpret metrics and graphs to show how an NCCCS institution is doing compared to previous terms
  - Graphs to be customized based on five phases in the enrollment funnel
- Year
  - Graphics and visualizations in the academic year tab are the same as in the term tab, providing easy-to-interpret metrics and graphs to show how NCCCS institution is doing compared to previous academic years
- Table
  - In this tab, NCCCS institution users will be able to select either year or term to view a table with columns displaying information customized by NCCCS institutions

Global controls allow for a variety of filters to be applied to the funnel data:

- One or more majors
- One or more territories
- One or more segments

Custom filter built by NCCCS institutions

Events

The events dashboard is designed to provide further insight into the effectiveness and success rates of events created and tracked through Element451. NCCCS institutions can use the different tabs for diving deeper into the registration trends and the overall performance of events through this dashboard. NCCCS institutions will be able to see the direct impact of events on the student funnel and enrollment.

Tabs are divided into registration and event performance, each with its own visualizations and graphs:

- Registration
  - Metrics tracked in the log can be customized by NCCCS institutions
  - Data can be presented in table form or a line chart
  - Visualizations showing the top three registered events
  - Line graph showing event type by day
  - Bar graph showing the median days between registration day and the actual event

- ○ Registration log table to show event name, date, and who has registered for events
- Event Performance
  - ○ This uses the same easy-to-interpret graphics as the funnel dashboard
  - ○ Data can be presented in table form or line chart
  - ○ Visualization showing overall attendees for institution events
  - ○ Stacked bar charts showcase attendance status (i.e., canceled, attended, missed) by data, based on institutions' configured time frame
  - ○ Stacked bar charts showcase attendance rates for events by date, based on institutions' configured time frame
  - ○ Bar charts also capture metrics of event performance broken down by event type
  - ○ Event performance tables capture individual event data
  - ○ The event performance log shows year-over-year metrics for event performance

Global controls allow for a variety of filters to be applied to event data:

- Event Type
- Event Name
- Student Term
- Student Major
- Student Type

Tasks Performance

Tasks has a main dashboard, then is broken into smaller sub-tasks that include:

- Comprehensive overview
  - ○ High-level, all-in-one place task overview
  - ○ KPI percentages for overall task success, tasks created, tasks due, incomplete tasks, and tasks completed (date ranges are customizable to each NCCCS institution user)
  - ○ Visualizations showcasing top task data (i.e., top five (5) tasks due)
- Task Creation
  - ○ Heat map capturing hours when tasks are generated by NCCCS institution staff
  - ○ Layered maps with drill-up and drill-down capabilities
    - ■ Organize tasks by type and name, drill down for the team, position, and staff members creating tasks
  - ○ Standard log of task type and associated staff member
- Tasks Due
  - ○ Table listing outstanding tasks, type, and. the team/staff assigned to the task
  - ○ Bar graph showing allotted time for outstanding tasks compared to actual time spent on tasks
  - ○ Quickly visualize how time is allotted vs. used
- Incomplete Tasks
  - ○ Drill-down capability also shows team and staff members
  - ○ Day-by-day percentage bar chart of completed tasks vs. incomplete tasks
  - ○ Bar chart outlining types of outstanding tasks with categorical incompletion percentages
  - ○ Bottom log with type of overdue task, creation date, and assigned staff member(s)
- Task Completion
  - ○ Hover over bubbles to see completion time, completion rate percentage, and days allotted for tasks
  - ○ Heatmap organized by task type and amount of time needed for completion

- ○ Bar chart comparing actual completion time of task next to budgeted for each completed task

Sources

The sources dashboard displays visuals of where student leads originate. NCCCS institutions can use the different tabs for diving deeper into specific student attributes, web sources, and the overall source counts through this dashboard. NCCCS institutions will be able to see the direct impact of sources on the student funnel and enrollment.

Tabs are divided into an overview, explorer, and web sources tab, each with its own visualizations and graphs:

- Overview
    - ○ Pie chart showing counts of sources
    - ○ Line chart showing counts of sources over time
    - ○ Funnel stage table by source
    - ○ NCCCS institutions can customize funnel stages to its funnel stage order
    - ○ Conversation rates table by source
- Explorer
    - ○ A section dedicated to a selected funnel stage
    - ○ Map of where the students are located for that funnel stage
    - ○ Charts of student counts by source name for that funnel stage
    - ○ A section dedicated to exploring student attributes and their funnel stage
    - ○ Table of funnel counts broken down by source and the selected student attribute
    - ○ A section dedicated to the first source listed on a student profile
    - ○ Sankey diagram displaying the first source and the students' current funnel stage
- Web Sources
    - ○ Table of funnel counts by UTM parameters
    - ○ Table of funnel counts by URL

Global controls allow for a variety of filters to be applied to event data:

- Source Type (App, Web, Event, Survey, Custom)
- Source Name
- Source Segment (a further drill down into a Source Name)
- Student Term
- Student Major
- Student Type
- Segment Name

Conversations

The conversations dashboard is designed to provide further insight into how their NCCCS institution is interacting with students/prospects through the conversations module. NCCCS institutions can benefit from understanding overall conversation numbers, response times, and peak times for conversations beginning. NCCCS institutions can see period-over-period comparisons, monthly changes in conversation performance rates, and a wide variety of performance measurements.

Tabs are divided into overview and dimension tables, each with its own visualizations and graphs:

- Overview Page
  - Easy-to-interpret percentage graphics showcasing metric rates for conversations opened, conversations closed, messages sent, messages received, and an average number of messages per conversation.
  - Period-over-period performance of conversations
- Weekly average response time for incoming messages
- Hourly breakdown of conversation opening
  - Helping identify the best time to start a conversation based on communication type
- Overall distribution of conversations based on communication type
  - Live chat, SMS messaging, emails
- Breakdown of messages by character length
  - Live chat, SMS messaging, emails
- Analysis of message initiation
  - Internally (outbound) or externally (inbound)
- Conversations broken down by student type
- Dimensions Table
  - Dimension selection: Choose whether you want to view metrics by territory, funnel stage, citizenship status, state, gender, major, or student type
  - Breakdown of all available conversation metrics based on selected dimension

Global controls allow for a variety of filters to be applied to conversation data:

- Segment Name
- Channel
- Major Name
- Funnel Stage
- Identification Status
- Student Type
- Territory
- Message Origin

Web Activities

NCCCS institution users can leverage Element451's web activities dashboard to have greater insight into the most used pages on each institution's website, the time spent on each page, and the role each website page has on the overall enrollment funnel. This dashboard is broken down into a few different visualizations and graphics outlining behaviors, sessions, performance, acquisition, and audience, giving NCCCS institution users a view into what pages are attracting viewers and engaging individuals. The dashboard's smaller tabs include:

- Behaviors
  - Sessions (opened pages or opened website)
  - Average session duration
  - Average sessions per user
  - Average time to form submission
    - How long does it take for students to submit a form
  - Average session duration after form submission
    - How long people stay on a page after filling out a form
- Sessions
  - Evaluate how many sessions are started over a defined period

- ■ This is overlaid as a comparison to previous years
  - ○ Graph showing the amount of sessions started over a defined period
    - ■ Define the period examined by day, month, quarter, year
- Performance
  - ○ Total page views
  - ○ Average time on page
  - ○ Average time to lask click on a page
  - ○ Average pages viewed per session
  - ○ Table outlining each metric per URL
    - ■ This table provides above metrics for each individual page on NCCCS institutions' website
- Acquisition
  - ○ Top three referrer segments
  - ○ Top three full entrance URLs
  - ○ Referrer segment, referrer, and conversion rate table
- Audience
  - ○ Identified and unidentified sessions graph
    - ■ Understand the amount of traffic to NCCCS institutions' website from students who are already signed in or have a profile in Element451
  - ○ Map identifying the number of sessions by zip code
  - ○ Top three Operating Systems per defined period
  - ○ Top three Browsers per defined period
  - ○ Count of sessions by dimensions
    - ■ NCCCS institutions can set the dimension to any tracked trait within Element451 (engagement score, active major, etc.)

Appointments

The Appointments dashboard is a powerful analytical tool designed to provide an in-depth view of all appointment-related metrics. Accessible through the Insights451 sub-menu, it allows users to evaluate metrics by date, segment, and a variety of student dimensions. Some of its standout features include:

- Performance Analysis: Users can view period-over-period comparisons, monthly variations in appointment metrics, and a comprehensive range of performance indicators.
- Flexible Global Controls: These controls, found at the top of each dashboard tab, let you filter and manage the data displayed. They encompass filters for aspects like segment, major, student type, and term, ensuring a tailored viewing experience. Notably, changes made in one tab's filters apply across the entire dashboard.
- Segmentation: The dashboard facilitates detailed segmentation by allowing users to create specific segments in the People module and then use them to filter the dashboard. This provides a customized view based on dimensions that are most relevant to the user.
- Diverse Visualization Tabs:
  - ○ Overview Tab: This offers a snapshot of appointment metrics, displaying highlights like period-over-period performance, total metrics for various appointment types, top performers in different categories, and a detailed view of the time interval between scheduling an appointment and the actual appointment date.
  - ○ Explorer Tab: Geared for a more detailed breakdown, this tab provides a funnel view of metrics by various criteria, as well as an appointment log that can be filtered by different identifiers and stages.

With such a comprehensive suite of features, the Appointments dashboard in Element451 empowers users to obtain a holistic understanding of appointment dynamics, optimizing engagement and efficiency.

Management Dashboard

This dashboard is designed specifically for NCCCS institution management staff to track the efficiency of task completion for each individual staff member. This dashboard can be filtered to look at individuals, teams, and overall staff, depending on how NCCCS institutions' management team would like to evaluate task completion. Element451's management dashboard is designed to give a specific view of staff task accomplishment. This dashboard is permission-based, NCCCS institution users specifically determine who has access to review the information collected in the dashboard.

- Overview
    - See general information that can be filtered and sorted by staff member and date range
- Tasks
    - Visualizations that utilized individual staff members and names have been moved here
    - Top 5 outstanding tasks
    - Staff member statistic for completing task
    - Aggregate the data for time intervals for visualizations here
    - Bar chart for incomplete
        - This can be broken down by type, name, or team
    - Heat map of when tasks are being completed
        - Complete log of tasks
    - Color coordinated for what is upcoming, completed, or due
- Conversations
    - Staff member, team, and type of conversation
    - Inbound vs. outbound
        - What type of communication
        - How long does it take to respond
    - Break down by territory
        - Timestamp at the bottom of the dashboard
        - Time on it on the live dashboard
- Notes
    - Staff member, team name, position, note type
        - Follow up calls
        - Length of notes
            - Detailed vs. short notes
- Decisions
    - Staff member, team name, position
    - Released by staff member
    - Individuals with top decisions released
    - Decisions notes updated and created
    - Statistics with what is updated by staff member

Insights Q

NCCCS institutions can also benefit from Element451's Insights Q to generate granular and specific reports related to the information NCCCS institutions would like to see about the data collected within Element451. Insights Q is an AI-powered, natural language query tool that enables NCCCS institution users to query their data directly from the data models on which Insights451 dashboards are built. This is another way we are

bringing the power of natural language and AI to the Element451 platform. By providing visibility into what works best for your institution, we empower you to strategize effectively and optimize resource allocation.

Insights Q quickly produces reports based on the natural language queried with the data stored in Element451. For example, instead of using various filters within the Campaigns dashboard to see the open rate for a marketing campaign for Fall 2022 prospective biology applicants, NCCCS institution users can directly ask, "How many emails were opened by prospective biology students in Fall 2022?" The corresponding reporting with visualizations of the data will unfold in Insights451. This approach offers NCCCS institution users a streamlined method to access specific data, eliminating the need to sift through extensive datasets using filters. The result is a more efficient report generation process, saving invaluable time and simplifying data extraction.

Within Insights Q, as a query is entered, the system intuitively crafts a visual representation that aligns with the nature of the user's question and the underlying data. While Element451 initially showcases what it deems the most fitting visualization, NCCCS institution users retain the flexibility to modify it according to their unique requirements. For instance, if an automatically generated bar chart doesn't suffice and a doughnut chart proves more apt, users can effortlessly toggle between chart types via the 'visual type' button. This interface ensures all potential visualization formats related to a specific query are at the user's fingertips.

Another powerful dimension of Insights Q is its forecasting capability. Drawing from historical data and patterns collated within Element451, NCCCS institution users can navigate to the Insights/Forecasting section to gain predictive insights. This feature isn't merely about viewing data; it's about strategizing for the future, evaluating ROI, considering the revamp of campaigns, setting informed goals for the forthcoming period, and more. The same versatility in visual formats extends to the forecasting feature, ensuring users always have the most insightful representation of the data.

All visuals and reports crafted within Insights Q can be seamlessly exported or downloaded, consistent with other Element451 reporting functions. Permissions associated with Insights Q align with those established for the Element451's Insights451 module, maintaining a consistent user experience.

b. Provide standard and customized reports regarding the number of applications submitted, demographics of applicants, number and type of communications sent, etc.

Yes. Standard and filterable reports of this nature would be located in our Campaigns reporting, our Funnel reporting, and our Conversations reporting dashboards. NCCCS can also leverage Insights Q to ask these types of questions using natural language.

Campaigns

By leveraging the campaign dashboard, NCCCS institution users will have greater insight into the success of specific marketing campaigns, email and SMS performance, and the engagement level of different segmented and tagged groups. This enables NCCCS institutions to make informed decisions on marketing campaigns, communication effectiveness, and overall, see how Element451 is making a difference.

Tabs are divided into campaigns, segments, and tags, each with its own visualizations and graphs:

- Campaigns
  - Email Performance
    - Easy-to-Interpret percentage graphics showcasing sent, open rate, click rate, click-through rates, and year-over-year comparison
    - Line graph tracking trends based on an institution's specified period of time to track email campaign effectiveness over time
    - The email performance table tracks individual emails by name, NCCCS institutions can configure the table to showcase information needed to see how students are engaging with different types of emails received
  - SMS Performance
    - Easy-to-Interpret percentage graphics showcasing sent, open rate, click rate, click-through rates, and year-over-year comparison
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    - The SMS performance table tracks individual SMS messages by name, NCCCS institutions can configure the table to showcase information needed to see how students are engaging with different types of SMS messages received
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  - This will help NCCCS institutions understand the effectiveness of a marketing campaign that is designed for a specific group of individuals
  - Both the Segment and Tags tabs are broken down by email performance and SMS performance
  - These tabs capture the same information from the campaigns page, but the information is organized based on an institutions-selected segment or tag

Funnel Stages

The funnel dashboard evaluates the milestones students complete through the admissions to the enrollment process. Tabs allow for an overview of any specific part of the funnel stage (i.e., prospective, admitted, enrolled, etc.) and how current progress compares to previous terms or years. This dashboard also provides insight for NCCCS institutions to understand the demographics of its students. Tabs are divided into term comparison, academic year comparison, and a dimensional table, each with its own visualizations and graphs:

- Term
  - Colored arrows clearly demonstrate funnel stage trends
  - Line chart to display term-to-term trends
  - Cumulative bar chart to show term-to-term trends based on custom information filtered by NCCCS institutions
  - Point-in-time visualizations (i.e., Fall 2022 and Fall 2021) with easy-to-interpret metrics and graphs to show how an NCCCS institution is doing compared to previous terms
  - Graphs to be customized based on five phases in the enrollment funnel
- Year
  - Graphics and visualizations in the academic year tab are the same as in the term tab, providing easy-to-interpret metrics and graphs to show how NCCCS institution is doing compared to previous academic years
- Table
  - In this tab, NCCCS institution users will be able to select either year or term to view a table with columns displaying information customized by NCCCS institutions

Global controls allow for a variety of filters to be applied to the funnel data:

- One or more majors
- One or more territories
- One or more segments

Custom filter built by NCCCS institutions

Conversations

The conversations dashboard is designed to provide further insight into how their NCCCS institution is interacting with students/prospects through the conversations module. NCCCS institutions can benefit from understanding overall conversation numbers, response times, and peak times for conversations beginning. NCCCS institutions can see period-over-period comparisons, monthly changes in conversation performance rates, and a wide variety of performance measurements.

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  - Live chat, SMS messaging, emails
- Breakdown of messages by character length
  - Live chat, SMS messaging, emails
- Analysis of message initiation
  - Internally (outbound) or externally (inbound)
- Conversations broken down by student type
- Dimensions Table
  - Dimension selection: Choose whether you want to view metrics by territory, funnel stage, citizenship status, state, gender, major, or student type
  - Breakdown of all available conversation metrics based on selected dimension

Global controls allow for a variety of filters to be applied to conversation data:

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- Channel
- Major Name
- Funnel Stage
- Identification Status
- Student Type
- Territory
- Message Origin

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All visuals and reports crafted within Insights Q can be seamlessly exported or downloaded, consistent with other Element451 reporting functions. Permissions associated with Insights Q align with those established for Element451's Insights451 module, maintaining a consistent user experience.

c. Compile and analyze survey data

Yes. NCCCS institutions will have an entire module dedicated to surveys. Element451's surveys feature will help NCCCS institutions collect feedback and data from past events, the admitted student experience, and more. Surveys are similar to forms, but have twice the engagement and interaction rate.

Our surveys module allows for easy-to-customize surveys to be utilized with individuals. Custom questions can be created using a variety of answer methods (fill in the blank, drop down, rating scale, etc.), and NCCCS institutions will also have the ability to use conditional logic (i.e., if "yes" is answered to Question 1, then a follow-up question will follow; if "no" is answered to Question 1, then it will push you right to Question 2). Surveys can be open for a limited time (where NCCCS institutions would choose start/end dates) or for an unlimited amount of time (surveys will always be open for submissions). Response data is clearly marked in Element451 and in real-time. Administrators can see the number of responses, who responded, the date and time of responses, how individuals responded, and questions are mapped into "stats" on graphs showcasing

response answers. Stats can also be filtered. For example, if an administrator only wants to view surveys that answered with "Very Dissatisfied" to Question 1, they can do so. This would allow an administrator to pinpoint which individuals need to be reached out to or have needs addressed. Segments can also be filters. For example, responses can be segmented (segments would all be previously created in the system by NCCCS institutions) by targets such as Fall 2023 prospects, geolocation, Spring 2023 applications, day of the week answered, etc.

NCCCS institution administrators with the correct permissions can edit surveys at any time, and a "last updated date" will show in the module. They can also be deleted if desired. Surveys can be shared via public link or using a QR code. Administers can preview a survey, and a notice will always show if the survey is "Active" or not. In addition, NCCCS institutions will have the ability to export survey responses in .pdf (graphs will show) or .xlsx (Excel spreadsheet list) format.

4.6 PERFORMANCE

a. Provide 99.9% availability

Yes. Element451 is a fully managed SaaS. It's hosted on Amazon Web Services (AWS) in a horizontally scaled manner. Our SLA guarantees 99.9% uptime. Data access is through our APIs and batch importing and exporting. Additionally, our data warehouse for reporting and analytics can be accessed via JDBC-compliant connectors.

Element451 has never experienced any type of large outage.

b. Provide real-time synchronization of data within five (5) minutes or less with Ellucian Colleague in a Unidata environment

Yes. One of the key advantages that distinguishes Element451 from its competitors is the seamless integration it offers with external solutions. This is particularly noteworthy in the case of bi-directional integration with Ellucian products, which is achieved through flat-file or API connections, including an open REST API. Integrating Element451 with NCCCS institutions's tech stack among individual campuses can be achieved by first evaluating each integration's specific requirements and the systems' capabilities. Our CRM can import data from multiple sources, and users can define import templates (schemas) via our drag-and-drop interface. Element451's highly efficient and flexible means of data transfer ensures a smooth and streamlined experience for its users, setting it apart as a valuable solution for higher education institutions.

For real-time integration, the NCCCS institution would integrate using an API connection. Often Ellucian products are integrated via Ellucian Ethos.

API Connection

Element451 also offers API connectivity (additional cost if we build and maintain the integration, however; the API is open for our partners to use at no cost if they decide to build and maintain) for integrating with Banner or Colleague. Element451 provides an open REST API that allows for real-time, seamless integration. This will facilitate data sharing and exchange for a variety of purposes, including provisioning users and groups in both applications and generating reports that can be filtered by academic and demographic criteria stored.

As an example, an API integration with Ellucian Banner or Colleague would include the following steps:

1. NCCCS institutions will work with Element451 to configure the Ethos API keys using Ellucian Ethos as the connection.
2. NCCCS institutions configure Banner or Colleague to receive data from Ethos and map it to the appropriate database tables.
3. Element451 and NCCCS institutions will identify the data objects and fields that need to be integrated between Element451 and Banner or Colleague, such as data sources (terms, majors, degrees, etc), student information, and application data.
4. Element451 will define the mapping between the data objects and fields in Element451 and Banner or Colleague.

5. Element451 will configure the API integration to extract data from Element451 and push it to the appropriate Ellucian Ethos endpoints, which populates the table in Banner or Colleague.
6. Element451 will test the API integration to ensure that data is correctly imported into Banner or Colleague.
7. NCCCS institutions will configure change notification and Ethos endpoint for data that is sent to Element451.
8. Element451 will test API integration from Banner or Colleague to Element451 to ensure data is being imported correctly.
9. Element451 will configure workflow rules to determine the points at which records sync and handle Ethos matching errors.

Import/Export Capabilities

Data can be imported and exported from Element451 using either a flat-file or API connection available. Our connections allow data to be imported or exported from a variety of sources such as:

- Data imports support: Local File, SFTP, Dropbox, Google Drive, Amazon S3 and URL
- Data exports support: SFTP, Dropbox, Google Drive, Amazon S3, and Email Download Link

When setting up a data import or export, columns can be skipped or mapped to a standard field, which allows for selecting either name, value, or custom codes for applicable fields, or a calculated field, which allows for formulas to be used to verify and transform data before being imported or exported. When importing, Element451 supports direct and fuzzy matching of contact records as well as testing data imports to ensure that the data is correctly handled before performing an import. When exporting data, rows can be repeated based on applications, decisions, education, etc. as needed. Import and export tasks can run immediately or be scheduled for specific dates and times.

Implementation Data Plan

During the implementation phase, every institution follows a customized plan and integration schema. The Customer Success team will help NCCCS institutions determine the details and data mappings during the integration process.

The majority of integration work is typically concentrated in the final three weeks. The total duration of this process can range from three to five weeks, depending on the complexity of the integration itself, such as whether the API connection is built by Element451 or the NCCCS institution. With an API connection, the information is in real-time. At Element451, we remain committed to providing a seamless and efficient integration experience, and our team of experts will work closely with our clients to ensure that the process is executed with the utmost precision and attention to detail.

Element451 interfaces with the following systems and applications:

- Banner (Ellucian)
- Colleague (Ellucian) (Unidata, NC Customized Version)
- CFNC (College Foundation of North Carolina)
- Blackboard LMS
- Moodle LMS
- Modern Campus Destiny One
- Brightspace
- Microsoft Office 365 applications, including Outlook, Word, and Excel (import/export .csv files)

- SONIS (Jenzabar)
- Jenzabar 1
- Jenzabar EX
- Populi
- Peoplesoft
- Ellucian Go (MobileSolution)
- Collegix (Aptron)
- EDLumina
- Campus Nexus (Campus Management)
- CAMS (Unit4)
- Campus Cafe
- CAS
- Homegrown Student Information Systems
- Others

Integration Resources

To learn more about our integration capabilities, please see this link to information on our website: https://element451.com/product/integrations. We also have a full integration guide that can be accessed at https://integrations.element451.com/.

Element451 is committed to providing exceptional customer service and support throughout the integration process. Our dedicated team will work closely with you to explore all options and determine the necessary scope of integration work. You can count on us to guide you through every step, making the process less daunting and ensuring a seamless partnership with Element451.

4.7 SECURITY AND DISASTER RECOVERY

a. Provide role-based privacy and security settings

Yes. Each module within Element451 has its own permissions, which are controlled from a single user interface. When setting up the user profiles, the administrator can identify the specific permissions or permission group(s) that user should belong to. During the implementation process, Element451 can assist in the initial access needs of those being trained on the system. Custom permission groups can be created by department or type of access needed by module or as granular as the individual features within a module. The administrator always has the ability to update, adjust, add or remove permissions for a specific user or a custom permission group. For definitions surrounding permissions, see the below:

Permissions: Permissions give access to a team member to use a specific Element module, such as Campaign451 or App451. Each permission will have administrative or user access. Within each module, there are more detailed permissions that can be identified.

Groups/Roles: Groups are made up of multiple permissions. When a user is a part of a group, they have all of the permissions that are in that group. This is helpful for setting up permissions by department or based on a role at NCCCS institutions.

Create Custom Groups/Roles: If a team member needs access to a module and there is not an existing group to give them, you can create a new group with the appropriate permission.

b. Authenticate users via direct LDAP connection to the college's active directory service or via single sign on using SAML or WS-Trust

Yes. SAML v2.0 is supported. Element451 is able to use any SAML SSO solution.

c. Provide data backup in accordance with NIST 800-53 standards as part of the disaster recovery plan

Yes. Element451 implements and maintains backup procedures and systems, redundant systems, and disaster recovery systems designed to protect against and minimize interruption to any services. There are incremental backups of all data and documents. History of backups are kept as well. We conduct annual tests of our disaster recovery plan. Element451 is doing periodic backups daily of the system. Every week's backup is saved for one (1) month, and every month's backup is saved for one (1) year. Also, at any point, Element451 has a backup for the last seven (7) days, meaning we can go to any second for those seven (7) days and restore all data from there.

See **Exhibit H** for Element451's entire Business Continuity & Disaster Recovery Plan.

6.0 HISTORICALLY UNDERUTILIZED BUSINESSES

"Historically Underutilized Businesses (HUBs) consist of minority, women and disabled business firms that are at least fifty-one percent owned and operated by an individual(s) of the aforementioned categories. Also included in this category are disabled business enterprises and non-profit work centers for the blind and severely disabled." http://ncadmin.nc.gov/businesses/hub

Element451 is not a Historically Underutilized Business (HUB).

Pursuant to N.C.G.S. §§ 143B-1361(a), 143-48 and 143-128.4, the State invites and encourages participation in this procurement process by businesses owned by minorities, women, disabled, disabled business enterprises and non-profit work centers for the blind and severely disabled. This includes utilizing subcontractors to perform the required functions in this solicitation.

Element451 is not a Historically Underutilized Business (HUB). Element451 is operated in-house, with no need for subcontractors.

Is Vendor a Historically Underutilized Business? YES NO

No. Element451 is not a Historically Underutilized Business (HUB).