Kuali
student: next generation student system

UBC IMPLEMENTATION PROJECT TEAM

IT Managers– August 10, 2009 v1.1

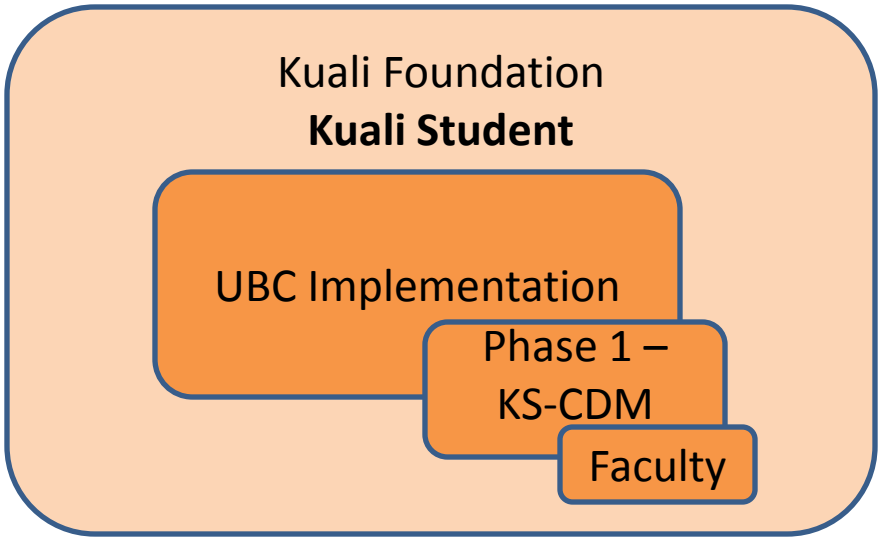
ID46130

UBC Implementation – Kuali CM

Doug Gregg
doug.gregg@ubc.ca

Agenda

- Kuali
- UBC Implementation of Kuali Student
- Phase 1 – Implementing KS-CDM
- Faculty implementation
- Next steps



Why Kuali Student?

- Action on the existing SIS
  - Basic design is 20 years old, last major upgrade almost 10 years ago
  - Increasingly difficult to maintain and enhance (no leverage)
  - Needs major upgrades or replacement soon
- Kuali Student best able to meet our vision
  - Functional
  - Technical
  - Sustainable

Kuali Student meets our vision

- Functional
- Technical
- Sustainable

- **Community source** development ensures a sustainable future
- Founders are **implementing** the core services
- Founders are **sharing their implementation** experience
- A **community of users** will provide support
- Participation by **vendors and service providers**
- The **community** will continue to **evolve** the technology, architecture and services

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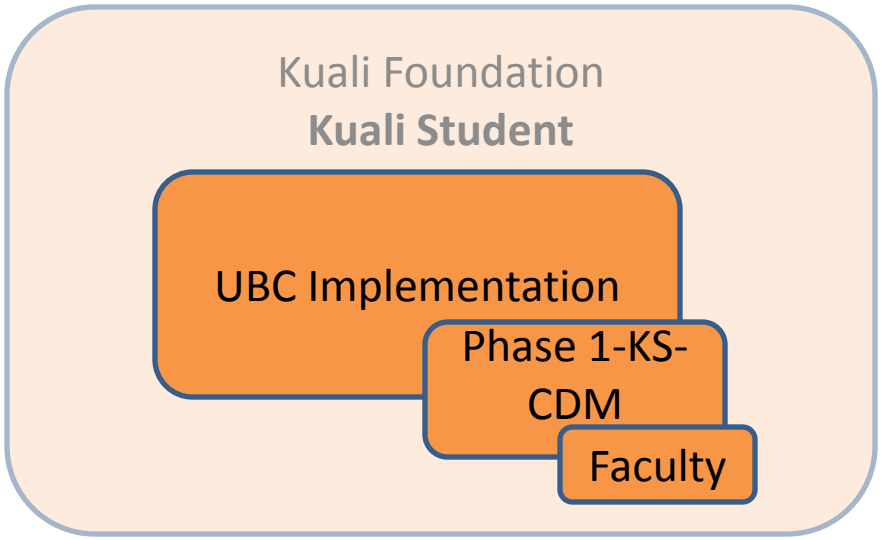


What is the UBC implementation?

- **Defining UBC requirements and processes** to configure the system
- **Change management within UBC**, including communications, training
- **Conversion** of UBC data and integration to external systems
- UBC user and technical **testing**
- **Installation** of hardware and software technology
- Post-implementation **operationalization** and sustainment

Scope

- Product scope
  - Person identity
  - Enrolment
  - Student financials
  - Scheduling
  - Learning unit
  - Program audit and academic evaluation
  - Admissions
  - Financial aid
- Functional scope
  - Formal learning within faculties and schools
  - Industry/career learning – Executive Education, Continuing Studies
  - Other learning -- workshops, health & safety

Product scope

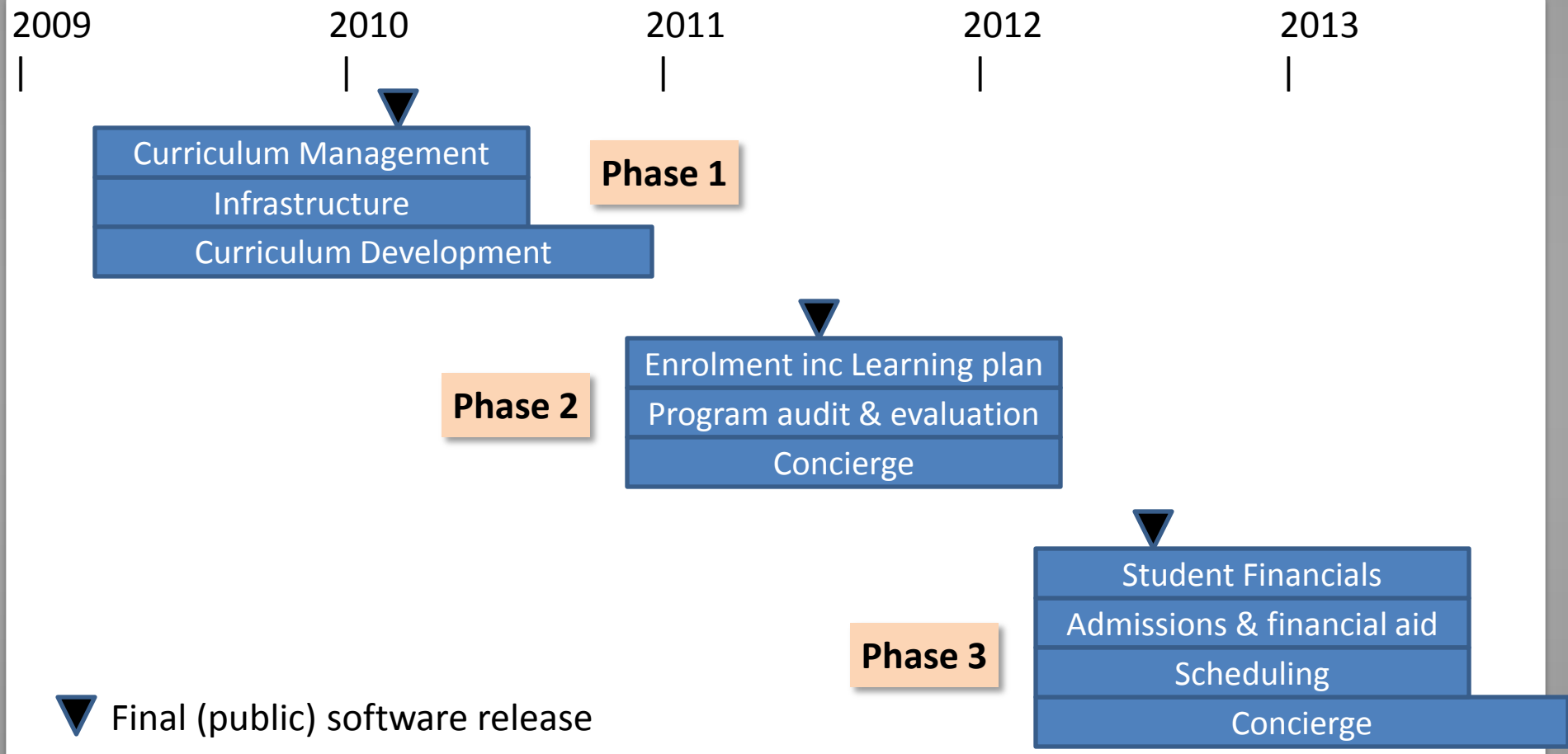
- **Person Identity**
  - manage Person info
  - support Authorization, Authentication
  - manage Groups, Organizations
  - manage Contact info
- **CM/Learning Unit Management**
  - manage catalogue of Learning Experiences
  - manage creation, approval new LUs
  - manage evaluation, review of existing LUs
- **Infrastructure**
  - Business rules management
  - Workflow middleware
  - Messaging infrastructure
  - Hardware and system software

- **Concierge**
  - Helping people interact with the system, providing advise and suggestions. Example:
    - Concierge "sees" student accept offer
    - Concierge "knows" rules and process
    - Concierge checks student info, program, required courses, elective opportunities, and guides student to solution
- **Enrolment**
  - Registration (ties learners to learning units)
  - Grades collection and Transcripts (manages learning results)
  - Transfer Credit and Equivalencies (manages provider to learning unit relationship)
  - Creates the student Learning Plan (matches student goals to competencies and learning unit opportunities)
- **Program Audit and Academic Evaluation**
  - Program Audit supports evaluation, status towards Learning Objectives
  - Academic Evaluations supports ongoing evaluation of academic progress
  - What-if scenarios to identify students at risk

Product scope (2)

- **Student Financials**
  - product pricing
  - assessment of additional Fees
  - determine Invoice and Payment plans
  - payment processing
- **Admissions**
  - capture Application info
  - manage Evidence (transcripts, translations, visa documents)
  - automated process workflow
  - evaluate Learner's qualifications
- **Concierge**
  - Further enhancements to concierge
- **Scheduling**
  - manage Learning Unit "offerings" (sections, meetings, exams)
  - schedule Resources (instructors, facilities, etc.)
  - manage and publish Calendars
- **Financial Aid**
  - manage awards, financial aid resources (merit and needs based awards, bursaries and loans)
  - maintain student characteristics and needs
  - assign awards to students

Schedule


2009
2010
2011
2012
2013
Curriculum Management
Infrastructure
Curriculum Development
Phase 1
Enrolment inc Learning plan
Program audit & evaluation
Concierge
Phase 2
Student Financials
Admissions & financial aid
Scheduling
Concierge
Phase 3
Final (public) software release

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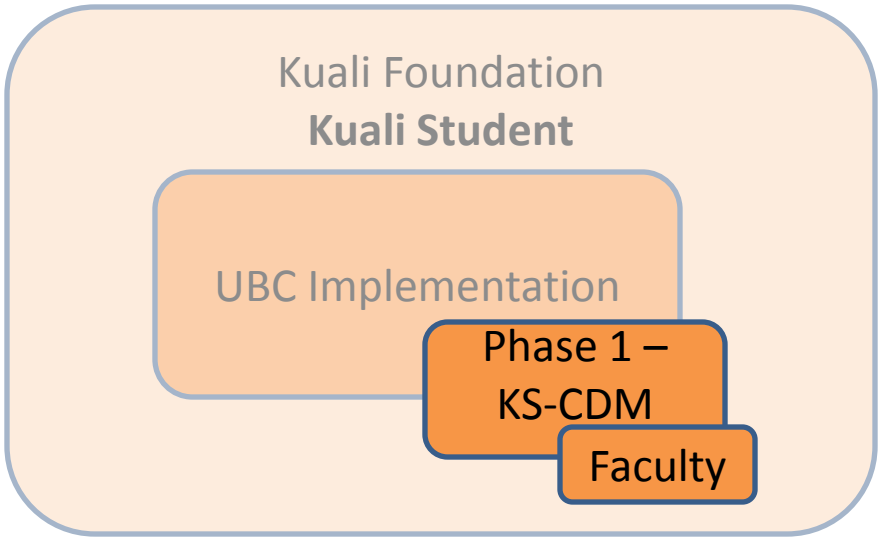
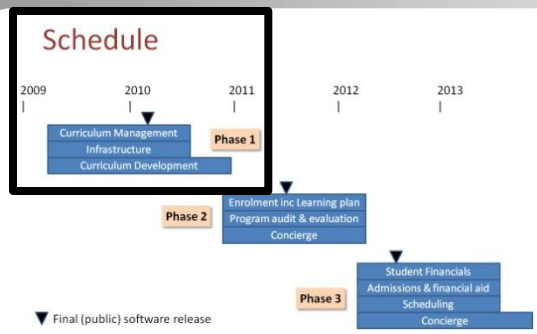


Implementation considerations

- What factors influence the deployment approach?
- What method is least disruptive?
- Does a pilot approach make sense?
- What project, faculty, administrative or other resources are required?
- What existing processes need to be changed?
- How will change be managed for faculty, staff and students?
- How should existing technologies be incorporated?
- What future plans need to be considered?

Implementation Phase 1 – KS-CDM

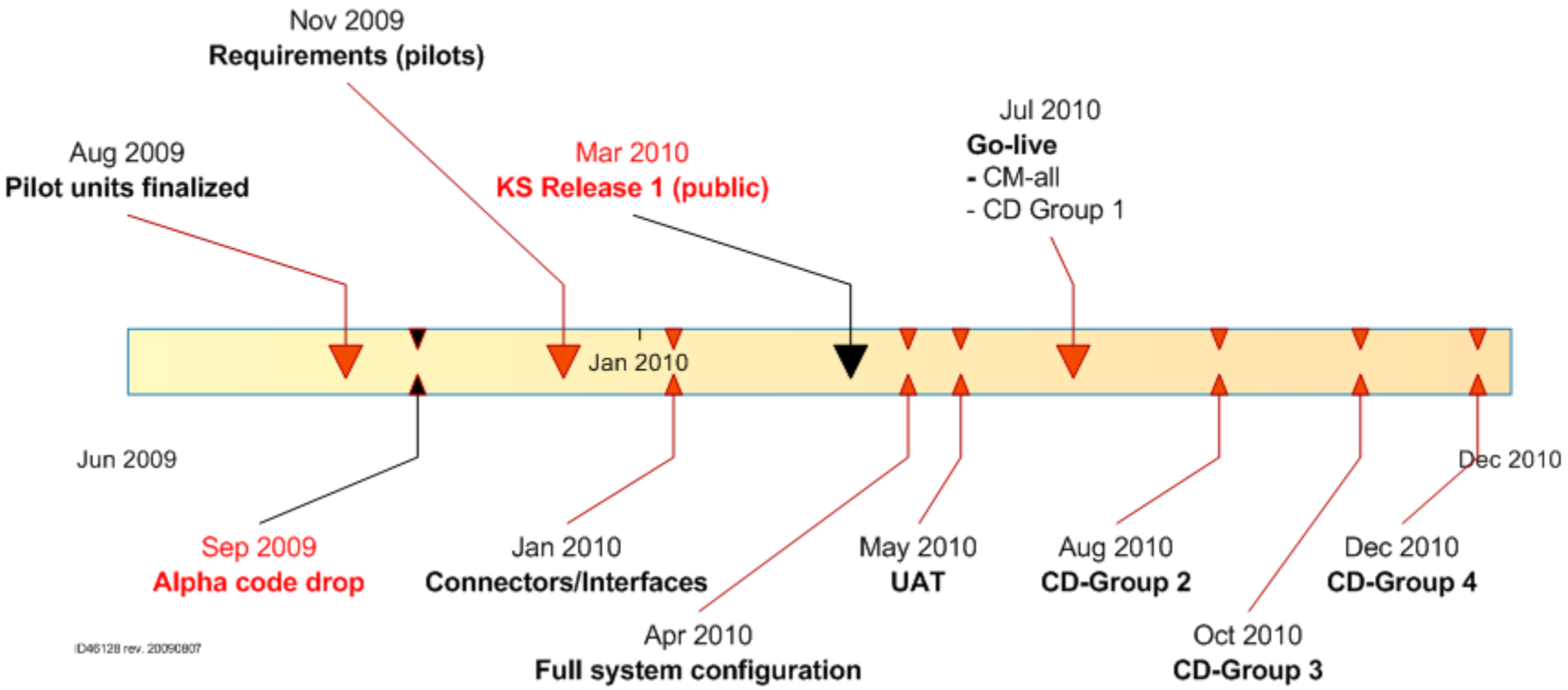


- Major components being implemented:
  - **Curriculum Development**
    - Course idea-to-approval work flow
    - Business rules tied to the curriculum development process
  - **Curriculum Management**
    - Course adds/changes done after Senate approval
    - Pre- and co-requisite management
    - Program adds/changes
- Includes the service-oriented architecture (SOA) components and underlying the supporting technologies
- Includes the Person Identity services, plus the Kuali Identity Management (KIM) services

CDM – What does this mean?

- KS-**CDM**–Kuali Student **Curriculum Development and Management**
  - KS Curriculum Management capability covers:
    - All curriculum functionality within the existing SIS
    - Non-traditional learning units such as experiential learning and projects
    - Non-traditional areas such as professional development courses and executive education
    - Can be viewed as the post-Senate subsystem, however KS-CDM approvals are configured as part of workflow. Multiple Senates ,or completely different approvals are configurable.
  - KS Curriculum Development capability covers:
    - All data elements required to feed curriculum management
    - Internal faculty or unit work flows and approvals
    - Upstream or pre-Senate work flow, business rules and data capture
  - CDM is a UBC term. The Kuali foundation uses simply curriculum management for both CD and CM, and has in the past used the term Learning Unit Management (LUM)
  - LMS functionality retained in existing systems such as WebCT

Timeline


Nov 2009
Requirements (pilots)
Aug 2009
Pilot units finalized
Mar 2010
KS Release 1 (public)
Jul 2010
Go-live
- CM-all
- CD Group 1
Jan 2010
Jun 2009
Dec 2010
Sep 2009
Alpha code drop
Jan 2010
Connectors/Interfaces
May 2010
UAT
Aug 2010
CD-Group 2
Dec 2010
CD-Group 4
Apr 2010
Full system configuration
Oct 2010
CD-Group 3
ID46128 rev. 20090807

Unit scope

	CM	Curriculum Development				
	July 2010	Grp 1	Grp 2	Grp 3	Grp 4	Phase 2-3
Faculties - UBCV						
Science	✓	✓				
Sauder						
Formal	✓	✓				
Executive Education						✓
Pharmaceutical Sciences	✓		✓			
Medicine	✓		✓			
Law	✓		✓			
Land and Food Systems	✓			✓		
Graduate Studies	✓			✓		
Forestry	✓			✓		
Education	✓				✓	
Dentistry	✓				✓	
Arts	✓				✓	
Applied Science	✓				✓	
Faculties - UBCO						
Applied Science - Engineering	✓	✓				
Arts and Sciences	✓		✓			
Creative and Critical Studies	✓		✓			
Education	✓			✓		
Graduate Studies	✓			✓		
Health and Social Development	✓				✓	
Management	✓				✓	
Other						
Continuing Studies						✓

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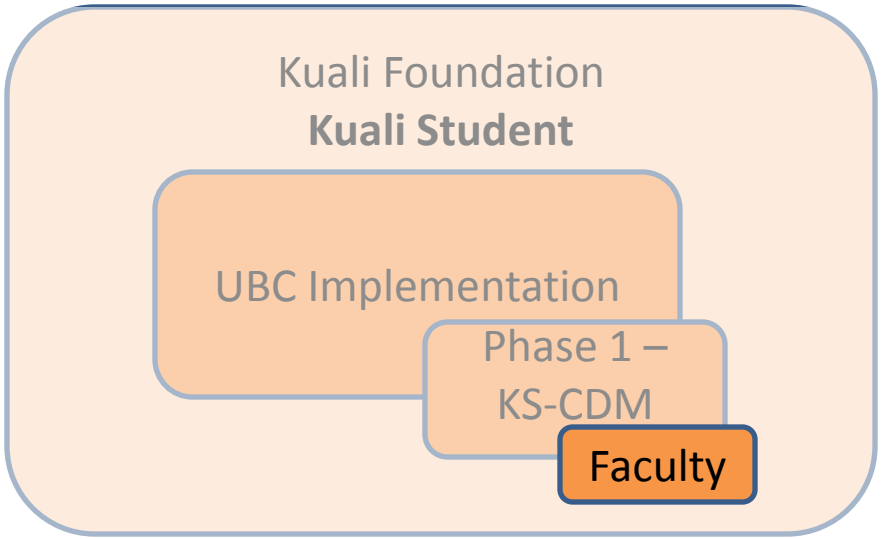
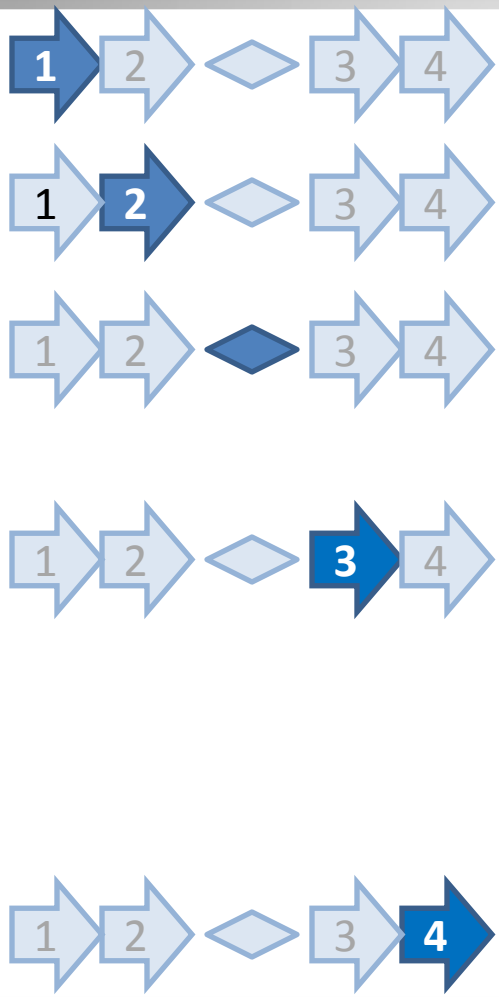


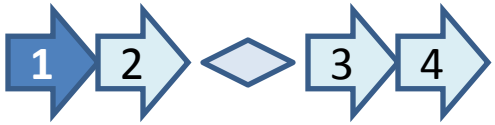
4 step implementation process



- Discovery process
- Initial Faculty engagement
- ✓ Checkpoint – confirmation of approach and high-level plan
- Requirements gathering and work flow
  - Definitions
  - Interim and final configuration approvals

  The Faculty change management plans will be updated in this segment
- Roll out preparation and go-live

Implementation process (1)

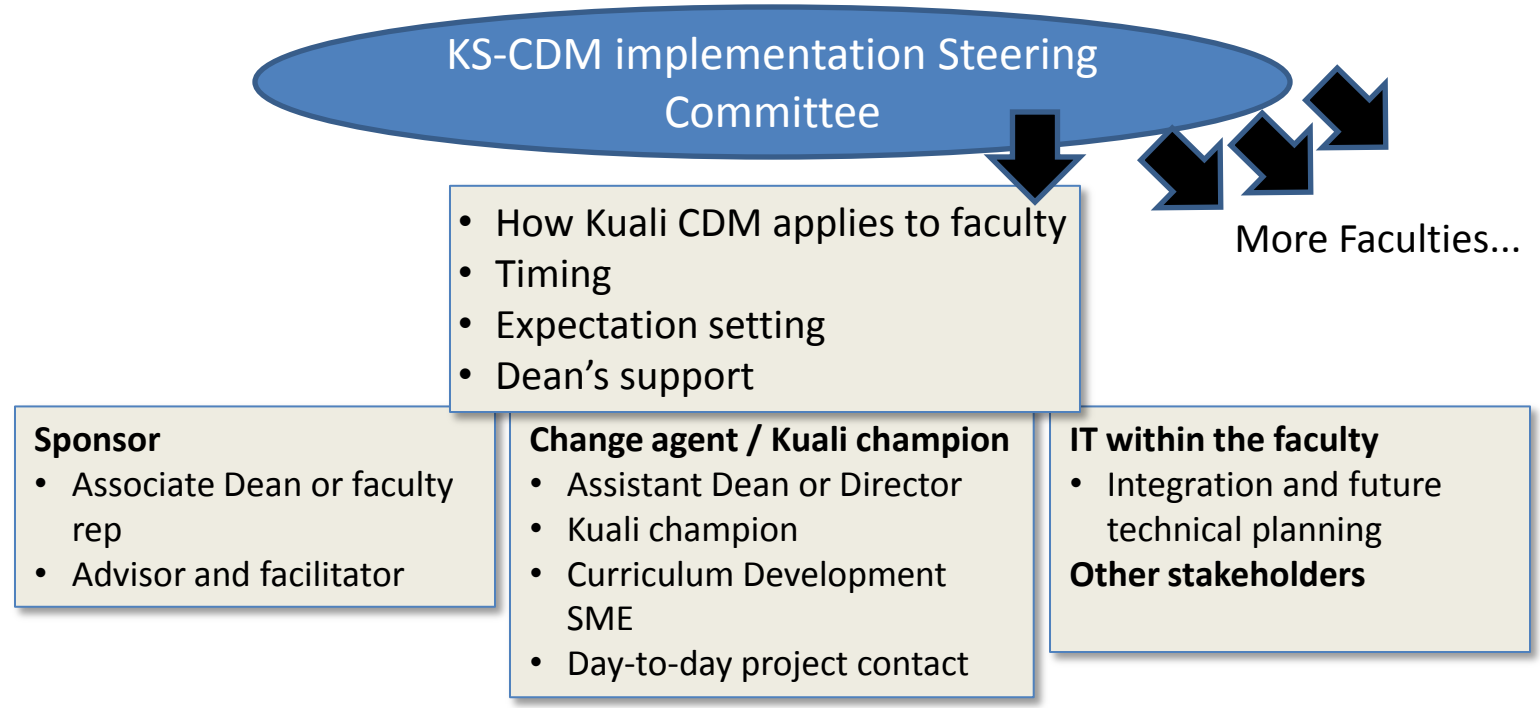


- For each Faculty:
  - Discovery process
    - Review of KS background information
    - Define the implementation support organization
    - Faculty structure as it relates to CDM
      - Departments and schools
      - Professional or other streams
    - Review template faculty implementation approach
    - Collect existing documentation regarding business rules, workflows, systems supporting CDM, IT plans

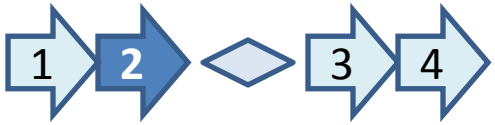
      Assumes Faculty leadership (Dean, Associate Deans, AVP's, Curriculum Chairs, etc.) are familiar with the KS-CDM implementation project
  - **Key output** – Faculty implementation support organization

Implementation enablement

- **Faculty project support organization** for communications, requirements and process definitions, change management, decision-making and approvals

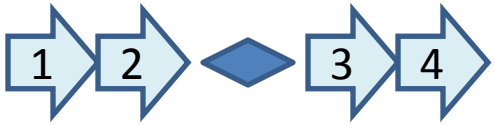


Implementation process (2)



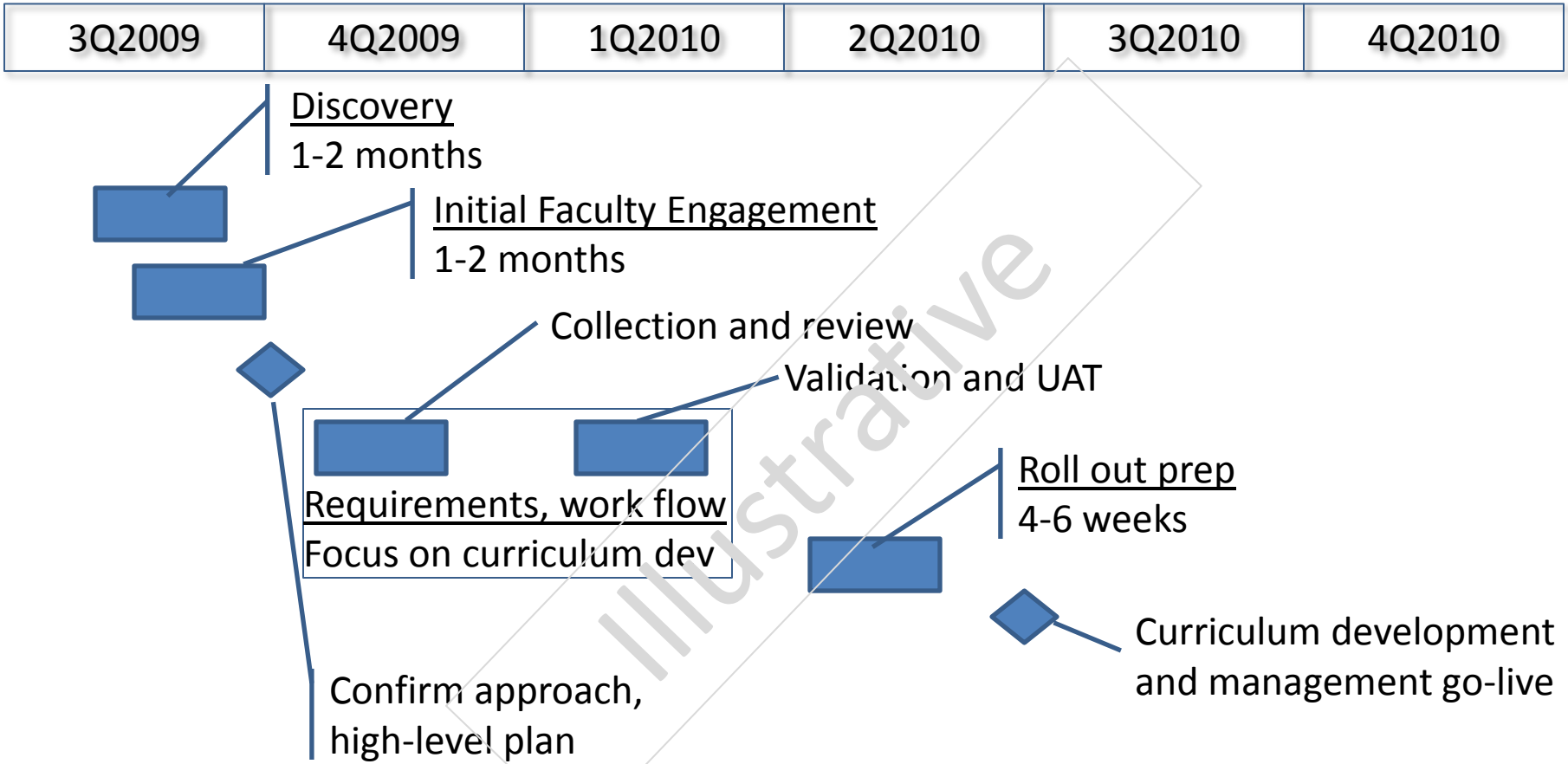
- **Initial Faculty engagement**
  - Implementation context
    - Review of the current CD and CM situation within the faculty
    - Review KS configurability and the end-to-end curriculum work flow
    - Identify technology considerations and plans
  - Structure and scope
    - Define faculty organization structure as it relates to CDM to establish in-scope for Phase 1, what components are for the future
    - Review likely resource required from the Faculty
  - High-level as-is and to-be curriculum development states
    - Review the conceptual as-is curriculum development state. For each faculty organizational unit, identify each unique CD process, and identify conceptually common processes
    - Review the conceptual to-be curriculum development state. Establish the number and type of common CD processes and the magnitude of change between as-is an to-be
  - Initial change assessment
    - Confirm key faculty stakeholders
    - Define the Faculty change structure and governance
    - Review possible impacts of going to the "to-be" state
  - Timing / candidacy for Group 1 CD (pilot) implementation or Groups 2-4
- **Key output** – Approach and high-level plan

Faculty Implementation checkpoint

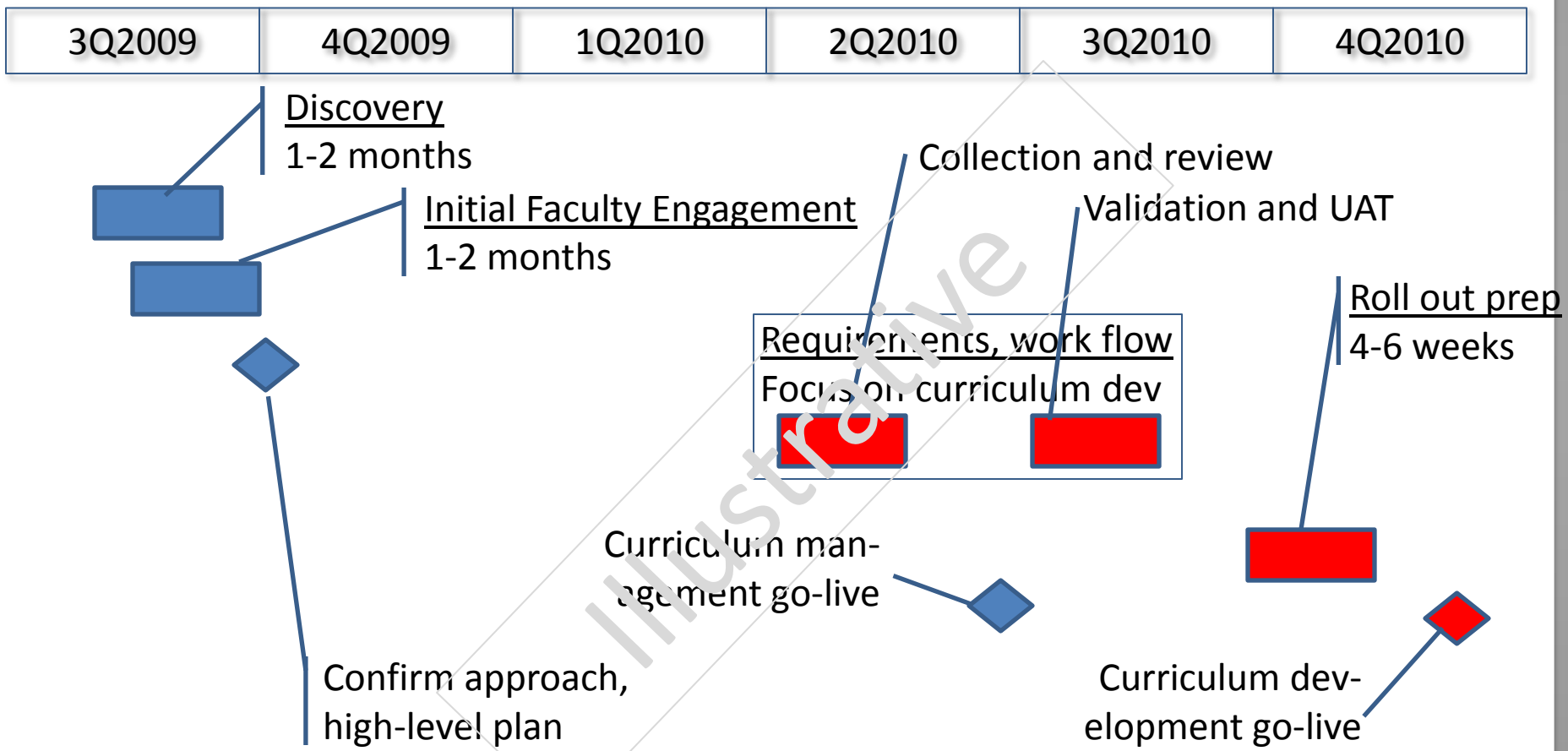


- Confirm approach and high-level plan
  - Agree the number of unique CD processes based on the organization structure
  - Review expected high-level scope and business requirements outputs and establish how the Faculty or unit will approve
  - Discuss initial change management factors (who is affected, key influencers, preferred communication approach(es), training requirements, known resistance factors, approach to assessing buy-in and change readiness)
  - Confirm Faculty requirements gathering and workflow definition
    - Process and timing
    - Resource requirements
  - Confirm go-live approach and timing (which group)

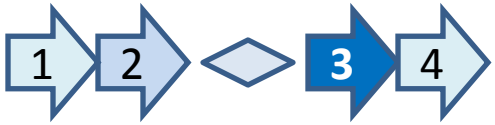
Group 1 (pilot) timing



Group 4 timing

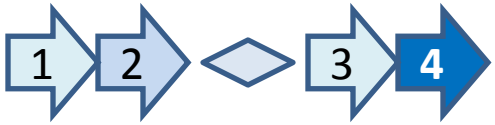


Implementation (3)



- Requirements and work flow / Phase 2-3 strategy
  - Requirements and work flow – units included in Phase 1
    - Work step required for all **Phase 1** units
    - Detailed requirements and work flow information gathering
    - Periodic review or approval of to-be configuration as it evolves
    - Iterative configuration validation commences once the system has been configured
    - **Key outputs:** fully configured and approved system; draft change management plan
  - Phase 2/3 strategy – for units excluded from Phase 1
    - Work step required for all units implemented in future **Phases 2-3**
    - Defines the expected timing of implementation, major requirements and dependencies
    - **Key output**: Unit strategy and high-level plan

Implementation (4)



- Roll out preparation and go-live
  - Approval of the deployment and change management plans
  - Training sessions
  - Go-live and monitoring of the impacts
  - Plan strategy based on simultaneous (Group 1) or 2-step (Groups 2-4) implementation
    - Group 1 Faculties – CM replacement and new CD functionality
    - Group 2-4 Faculties – CM replaced summer 2010, and separate CD implementation 3-4Q2010

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- Organize Steering Committee meeting
- Initiate for all Faculties
  - Discovery activities
  - Faculty implementation planning

Questions?

Thank you for your time!