SUBJECT	INTEGRATED RENEWAL PROGRAM – FINANCE/HR/STUDENT
MEETING DATE	NOVEMBER 26, 2018

Forwarded on the Recommendation of the President

APPROVED FOR SUBMISSION

Santa J. Ono, President and Vice-Chancellor

FOR INFORMATION	
Report Date	November 1, 2018
Presented By	Peter Smailes, Vice-President Finance & Operations Andrew Szeri, Provost and Vice-President Academic Barbara Meens Thistle, Vice-President Human Resources Deborah Buszard, Deputy Vice-Chancellor & Principal, UBC Okanagan Jennifer Burns, Chief Information Officer & AVP Information Technology Kate Ross, Associate Vice-President Enrolment Services & Registrar Chris Mercer, Program Director, Integrated Renewal Program

EXECUTIVE SUMMARY

The Integrated Renewal Program (IRP) is a multi-year initiative to transform UBC's academic and administrative support processes and system environments, and provide the foundation to meet UBC's future needs and requirements. The IRP is inclusive of Human Resources, Finance and Student core systems and businesses processes.

The Integrated Renewal Program is reflected in the recently published UBC Strategic Plan under "Strategy 5: Systems Renewal" to "Transform university-level systems and processes to facilitate collaboration, innovation and agility."

The UBC Board of Governors approved the FY18-19 $60m budget in April 2018. The Integrated Renewal Program is currently in the Architect Stage for the Human Resources and Finance streams which is scheduled to be completed by the end of December 2018. The Student stream has kicked off their Planning Stage activity which is scheduled to be completed by the end of February 2019. Release 1 of the IRP program is scheduled for an April 2020 go live. Release 1 scope is focused on the delivery of core capabilities for HR and Finance, along with some foundational aspects of Student (e.g. academic units' data). The majority of the Student scope is delivered in Release 2 through Release 4 per the Deployment Plan.

The new IRP Program Director conducted an assessment of the program in September of 2018. The assessment included a review of each of the six workstreams within IRP with a focus on their ability to support and deliver the Workday product solution. Existing program strategies and controls were examined along with the overall plan for the program. The analysis was completed through a series of meetings with project resources and a review of the document repository in SharePoint.

The assessment identified many opportunities within the IRP program that can be leveraged to increase chances for overall program success. These included:

- The team is energized, passionate and motivated for delivering a quality program for UBC

- The consulting partners have staffed the program with some of their very best resources with readily available Strategic and Quality assistance

- The UBC resources are highly capable and are available to address the expected and unexpected

- UBC leadership has a good understanding of what it will take to be successful and is committed to the program

The assessment also identified challenges that if not addressed, could lead to program delays, cost overruns and potential failure. These included:

- Lack of a comprehensive plan for the program

- There is a need to confirm the full set of features for the Workday solution for Student and the capabilities available within our existing timeline

- Like any large program of similar duration, the program has experienced high turnover, and attraction and retention of highly skilled staff is of concern that requires focus

- The governance model is complex with an emphasis on monitor and control rather than program success

- There is a perception that the Workstreams are siloed and that the organization chart does not demonstrate the partnership necessary for success

- The PMO isn't staffed appropriately to support the program and a program-wide understanding of the operational details is lacking

The challenges were prioritized, and corrective action plans were developed for October – December of 2018. The overall assessment finds the program capable of addressing these challenges once the corrective actions are completed.

Each of the challenges were reviewed and the new IRP Program Director identified the following priorities (and corrective actions) to be addressed by November 1, 2018:

- A lack of a comprehensive program plan

  o Update the existing plans for the Architect Stage to include the necessary task detail through all five releases (complete)

  o Add additional task details as the activities of future stages are finalized (complete)

  o Utilize the plans to provide the Workstreams with a focused view on the next 90 days (in progress)

  o Operationalize the details to support status reporting, communications and advanced planning (complete)

  o Secure the necessary infrastructure to support project management tools across the program (complete)

  o There is a need to confirm the full set of features in the Workday solution for Student and the capabilities available within our existing timeline

- o Expedite conversations with Workday regarding functionality expectations and where they fall on the existing release schedule (complete)

- o Accelerate conversations regarding specific gaps to ensure Workday's understanding of UBC's requirements (complete)

- o Obtain commitment from all parties on timeline (existing or revised) via contract process (planned)

- o Revise plan and resources (if necessary) to minimize impact on program budget (planned)

- The governance model is complex with an emphasis on monitor and control rather than program success

  - o Revisit Terms of Reference and Decision Making Matrix to ensure alignment and maximize the usage of leadership time and effort (complete)

  - o Reduce foot print of quality assurance **data gathering activities** within the project (complete)

  - o Develop a sustainable schedule and repetitive process to leverage **value-added** quality assurance activities across the program (complete)

  - o Instill a culture of Risk and Issue identification, mitigation and resolution within each Workstream (complete)

The remaining challenges will be addressed by January 1, 2019 with the following corrective actions:

- Like any large program of this duration, the program has experienced high turnover, attraction and retention of staff requires focus

  - o Expedite the development of the operational model for Workday@UBC (in progress)

  - o Leverage relationships with existing consulting partners to select firm to complete the study and proposed solution (in progress)

  - o Work with HR to consider and develop retention strategies for key resources within the program (planned)

- The PMO isn't staffed appropriately to support the program and a program-wide understanding of the operational details is lacking

  - o Hire a Director for the PMO (complete)

  - o Provide dedicated project management support to each Workstream (in progress)

  - o Align Project Managers, Coordinators and Assistants to provide value-added service to the Workstreams with a consistent method of delivery (in progress)

  - o Develop a realistic scope for benefits realization and leverage existing positions to support Risk and Issue Management (in progress)

  - o Leverage existing resources to implement strategies and controls across the various Workstreams (in progress)

  - o Establish responsibility and accountability within the operational program team and enable, empower and trust them to deliver (complete)

- There is a perception that the Workstreams are siloed and that the organization chart does not demonstrate the partnership necessary for success

  o Kick-off subcommittees and working groups for all functional Workstreams (complete for Finance\HR)

  o Ensure that program or Workstream specific communications contain a program-wide perspective (complete)

  o Utilize the PMO to monitor service delivery and adjust as necessary (complete)

  o Adjust status reporting to consolidate information into a common format and deliver timely updates (complete)

  o Explore team building opportunities within UBC to align the vision and delivery within the Workstreams (in progress)

  o Include consulting partners in the organization chart (complete)

  o Ensure partner engagement throughout the governance model (complete)

  o Leverage partner knowledge, experience and solutions where applicable to minimize "build from scratch" activities within the program (in progress)

  o Explore opportunities to utilize consulting versus hiring for activities constrained by time and/or resource capacity/capability (complete)

The challenges facing the IRP program are characteristic of other projects of similar size, scope and complexity. The priorities and corrective actions outlined above, align with the mitigation strategies of several of the top risks identified by Gartner's External Quality Assurance review. Although significant effort will continue to be required to complete the alignment, the program is capable of success.

INSTITUTIONAL STRATEGIC PRIORITIES SUPPORTED

✔ **Learning**	✔ **Research**	✔ **Innovation**	✔ **Engagement** (Internal / External)	✔ **International**

or ✔ **Operational**

BACKGROUND

In August 2017, under the direction of the UBC Board of Governors, the University's projects for HR, Finance and Student were brought together under the Integrated Renewal Program (IRP) to pursue one enterprise solution. The Student project implementation timeline was modified to align with HR and Finance.

In December 2017, following a competitive procurement process for the Student system and a comprehensive product fit/gap analysis for HR and Finance, it was determined that Workday could meet UBC's enterprise platform solution needs.

In April 2018, following a comprehensive review of the program scope, deployment plan, and resource requirements, the IRP prepared for Release 1 Plan Stage commencing May 1, 2018, the official start of implementation. The Release 1 Plan Stage was successfully completed on July 31, 2018, with the commencement of the Release 1 Architect Stage on August 1, 2018 through to December 31, 2018.

IRP Vision: *The way we support learning and research, and how we work at UBC will be transformed, creating a cohesive, integrated, and enriched experience for students, staff, and faculty.*

IRP Scope:

Human Resources	Finance	Student
• Benefits • Compensation • Core HR Management (incl. Onboarding/Off-boarding) • Payroll • Talent Acquisition • Workforce Management – Time & Attendance	• Institutional Accounting • Treasury & Cash Management • Procure to Pay • Travel and Expense • Research/Post Award Grants • Capital and Asset Accounting • Budget Development (core to Workday) • Revenue Accounting • Forecasting (Workday Planning) • Endowment Accounting (UBC Existing Methodology)	• Assessment Outcomes • Curriculum Management (limited) • Graduation • Learner Financial Management • Learner Financial Support • Learner Management • Transfer Credit • Progression • Scheduling • Registration • Enrolment • Program Planning and Mgmt. • Admissions (Undergraduate)

Previous Report Date	**September 27, 2018**
	INTEGRATED RENEWAL PROGRAM – FINANCE/HR/STUDENT
Decision	1. Information Only 2. Status Update on: (1) FY18/19 Major Milestones, (2) Plan Stage Scope, (3) Program Management Controls, (4) External Quality Assurance, (5) Risk and Issue Management, and (6) FY18/19 Budget
Action / Follow Up	Provide New Program Director's Assessment
Previous Report Date	**June 14, 2018**
	INTEGRATED RENEWAL PROGRAM – FINANCE/HR/STUDENT
Decision	1. Information Only 2. Status Update on: (1) FY18/19 Major Milestones, (2) Plan Stage Scope, (3) Program Management Controls, (4) External Quality Assurance, (5) Risk and Issue Management, and (6) FY18/19 Budget
Action / Follow Up	Execute FY18/19 Plan & Provide Status Reports to Board of Governors
Previous Report Date	**April 19, 2018**
	INTEGRATED RENEWAL PROGRAM – FINANCE/HR/STUDENT
Decision	IT IS HEREBY REQUESTED that the UBC Board of Governors approves an FY18/19 funding release of $60M for the Integrated Renewal Program.
Action / Follow Up	Execute FY18/19 Plan & Provide Status Reports to Board of Governors

Previous Report Date	**February 15, 2018** **INTEGRATED RENEWAL PROGRAM – STUDENT/HR/FINANCE**
Decision	1. Information Only 2. Status Update on (1) Negotiation Summary, (2) Program Governance, (3) Organizational Change Management, (4) Risk & Issue Management, and (5) Budget.
Action / Follow Up	Complete Next Steps to Establish Integrated Program as Outlined.

Previous Report Date	**December 5, 2017** **INTEGRATED PROGRAM UPDATE – STUDENT/HR/FINANCE**
Decision	1. Proceed to negotiations with Workday for an enterprise solution for Student, HR and Finance based upon the results of a fit-gap analysis. 2. UBC enter into an agreement with Workday for the enterprise solution (Student, HR, Finance) subject to final delegated approval granted to the Chair of the Board of Governors Finance Committee upon successful negotiation of the final contracts and a recommendation from ITAC and UBC Executive.
Action / Follow Up	Complete Next Steps to Establish Integrated Program as Outlined.

Previous Report Date	**September 21, 2017** **INTEGRATED PROGRAM – SASI/HR/FINANCE UPDATE**
Decision	1. Proceed to Negotiations with Workday and Deloitte for Student Solution. 2. Conduct a Comprehensive Fit/Gap Analysis to Assess Workday's Ability to Meet UBC's HR/Finance Needs.
Action / Follow Up	Complete Next Steps to Establish Integrated Program as Outlined.

Previous Report Date	**June 6, 2017** **SASI HR FINANCE PROCUREMENT INTEGRATED PROGRAM UPDATE**
Decision	1. Information Only 2. Status Update on the Request to Establish an Integrated HR FINANCE SASI Program
Action / Follow Up	Complete Next Steps to Establish Integrated Program as Outlined.