



<b>SUBJECT</b>	<b>INTEGRATED RENEWAL PROGRAM (IRP) UPDATE</b>
<b>MEETING DATE</b>	<b>FEBRUARY 7, 2019</b>

Forwarded on the Recommendation of the President

**APPROVED FOR SUBMISSION**

Santa J. Ono, President and Vice-Chancellor

**FOR INFORMATION**

<b>Report Date</b>	January 11, 2019
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- Presented By**
- Peter Smailes, Vice-President Finance & Operations
  - Andrew Szeri, Provost & Vice-President Academic, UBC Vancouver
  - Barbara Meens Thistle, Vice-President Human Resources
  - Deborah Buszard, Deputy Vice-Chancellor and Principal, UBC Okanagan
  - Ananya Mukherjee-Reed, Provost and Vice-Principal Academic, UBC Okanagan
  - Jennifer Burns, Chief Information Officer and AVP Information Technology
  - Kate Ross, Associate Vice-President Enrolment Services and Registrar
  - Trish Pekeles, Executive Director, Financial Operations
  - Alex Bayne, Managing Director, Strategic Workplace Initiatives, Learning & Engagement, HR
  - Chris Mercer, Program Director, Integrated Renewal Program

<i>If this item was previously presented to the Board, please provide a brief description of any major changes since that time.</i>	The Integrated Renewal Program (IRP) – HR, Finance, and Student – the new Program Director provided an assessment of the program.
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**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. IRP will implement Workday as the solution for Human Resources, Finance and Student in five separate releases. The Integrated Renewal Program is now entering the Configure and Prototype Stage for the Human Resources and Finance streams beginning in January 2019 for Release 1 scheduled for deployment in April 2020. 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 Student stream will wrap up their Plan Stage in February of 2019.

The program status is currently “Action Required” due primarily to potential schedule impacts with the Workday Student solution as well as remaining integrations work left over from the Architect stage for Human Resources and Finance. The remaining integrations work has been assessed and will be completed by the end of February 2019. The integrations approach has been revised to support the simplest path to success. The bulk of the integrations will be ready by the start of the Testing stage and have been prioritized to support end-to-end testing. The team is confident that this approach will mitigate any potential schedule impact for Human Resources and Finance.

UBC and Workday have been actively engaged in due diligence to ensure our readiness to implement the Workday Student module. After having had an opportunity to do a deeper review of our requirements in relation to their product roadmap, we have identified there will be an impact on the timeline for the release of the Student module. Work will continue on the Architect Phase slated for completion in March 2020 while UBC and Workday assess the options. The HR/Finance implementation will continue as planned with the first release slated for April 2020. UBC will work with Workday to identify next steps and any proposed changes. We will provide an update by the end of March 2019.

The **Key Accomplishments** for the program since the last report are detailed below.

- Completed the development of the comprehensive program plan which outlines program activity over the next three years.
- Established the remaining program governance bodies including the Integrated Process and Outcomes Committee (IPOC) and subcommittees.
- Collaborated with Workday to understand the scope and consequence of gaps with the Student product.
- Completed over 180 architecture workshops with Human Resources, Finance and Solution Design & Delivery (SD&D) that included discussions on future business process and integration requirements.
- Created the testing strategy for the program.
- Completed the first pass at the development of test scenarios to be utilized during the later Test phase of the program.
- Completed additional round of conversion activities in preparation of building the new tenant to support the next phase of the program for Human Resources and Finance.
- Completed the Student pre-planning activity and officially kicked off the Student Planning phase.
- Finalizing the deliverables for the Architect stage for Human Resources and Finance.
- Successfully launched the Transition Network in support of the program’s change management strategy.
- Completed the planning for the confirmation sessions and the kickoff for the Configure & Prototype stage for Human Resources and Finance. The confirmation sessions will be an opportunity for participants to see actual UBC data and configuration live in Workday.
- Worked with Faculties to develop application disposition recommendations and finalize estimates for integrations, retrofits and replacements.
- Completed the draft of the final implementation program budget and have begun the review and approval process within the governance organization.
- Created the tenant build for the Configure and Prototype stage for Human Resources and Finance.

- Created the tenant build for the Architect phase for Student.
- Continued to collaborate with other Universities implementing Workday to leverage lessons learned and influence the product development roadmap.

This report provides an update on the recent developments within the Integrated Renewal Program with respect to: (1) FY18/19 Key Outcomes, (2) Program Status, (3) Key Benefits, (4) Risk Management, (5) Costs, and (6) Program Schedule. The final detailed Implementation Plan and Budget are being finalized for Board 3 Approval in April 2019.

**STRATEGIC CORE AREAS SUPPORTED**

- ✓ People and Places      ✓ Research Excellence      ✓ Transformative Learning      ✓ Local / Global Engagement

**DESCRIPTION & RATIONALE      KEY OUTCOMES AND PROGRAM STATUS**




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.

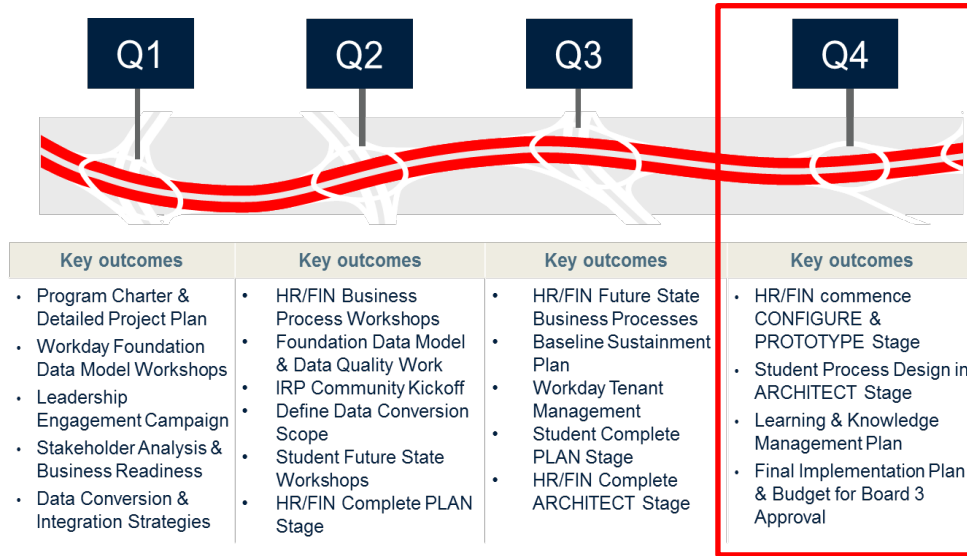
IRP Vision:

*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.*

Current IRP Scope:

 Human Resources	 Finance	 Student
<ul style="list-style-type: none"> <li>• Benefits</li> <li>• Compensation</li> <li>• Core HR Management (incl. Onboarding/Off-boarding)</li> <li>• Payroll</li> <li>• Talent Acquisition</li> <li>• Workforce Management – Time &amp; Attendance</li> </ul>	<ul style="list-style-type: none"> <li>• Institutional Accounting</li> <li>• Treasury &amp; Cash Management</li> <li>• Procure to Pay</li> <li>• Travel and Expense</li> <li>• Research/Post Award Grants</li> <li>• Capital and Asset Accounting</li> <li>• Budget Development (core to Workday)</li> <li>• Revenue Accounting</li> <li>• Forecasting (Workday Planning)</li> <li>• Endowment Accounting (UBC Existing Methodology)</li> </ul>	<ul style="list-style-type: none"> <li>• Assessment Outcomes</li> <li>• Curriculum Management (limited)</li> <li>• Graduation</li> <li>• Learner Financial Management</li> <li>• Learner Financial Support</li> <li>• Learner Management</li> <li>• Transfer Credit</li> <li>• Progression</li> <li>• Scheduling</li> <li>• Registration</li> <li>• Enrolment</li> <li>• Program Planning and Mgmt.</li> <li>• Admissions (Undergraduate)</li> </ul>

Per the April 2018 Board of Governors report, a set of key outcomes have been planned for each FY18/19 quarter. Having accomplished the objectives for the first three quarters of FY18/19 (Q1, Q2 and Q3), the Integrated Renewal Program will be focused on initiating the Release 1 Configure and Prototyping Stage for Human Resources and Finance and the Architect Stage for Student in the fourth Quarter (Q4) as illustrated below:



The program utilizes a dashboard for status reporting. The details for each component are listed below.

Constraint	Health	Trend	Comments
<b>Overall Status</b>	●	Action Required	Action required due to Resources and Solutions status
<b>-Budget</b>	●	On Track	On Track for FY 18/19 (Will include remaining years as part of April Board submission)
<b>-Scope</b>	●	On Track	On Track due to robust scope and change management processes
<b>-Resources</b>	●	Action Required	Action required due to vacancies in the PMO and OCM areas
<b>-Solutions</b>	●	Action Required	Action required due to incomplete integrations work for Human Resources and Finance and the Workday Student solution
<b>-Risks and Issues</b>	●	On Track	On Track due to robust risk management and complementing EQA processes

**BENEFITS** *KEY BENEFITS*

Learning, Research,  
Financial,  
Sustainability &  
Reputational

As stated previously, IRP looks to transform the way we support learning and research, and how we work at UBC, creating a cohesive, integrated, and enriched experience for students, staff, and faculty. The IRP is expected to deliver:

- **A reduced administrative burden for faculty, staff, and students.** Many of UBC’s administrative processes are manual, time-consuming and overly complex. We can simplify, and free up time to focus on priorities.
- **A more integrated way of working and interacting.** HR, Finance and Student administration and data are often interdependent, but are currently supported by different systems and data models. Workday will provide an integrated environment for the information and processes we need to do our work.
- **Replacement of aging systems that are no longer able to meet UBC’s needs.** UBC’s core systems are based on 25+ year old technologies that are increasingly brittle and difficult to maintain. Workday is a modern, mobile, cloud-based solution, with low technical maintenance overhead.
- **Readiness for the future.** New ways of working, teaching, learning and interacting are constantly evolving. Workday delivers a flexible, continually improving solution that can change along with UBC.

**RISKS** *RISK MANAGEMENT*

Financial,  
Operational &  
Reputational

Program risks are future uncertain events that, if they occur, would have a negative effect on achievement of one or more program objectives. The IRP has a robust Risk and Issues Management Framework in place. External Quality Assurance (EQA) for IRP is provided by Gartner and complements that framework. As of January of 2019, the program is currently tracking 58 active risks (down from 193 originally). The table below captures the top risks (very high probability and impact) and an abbreviated list of mitigation activities being addressed within the Integrated Renewal Program.

Risk Statement	Mitigation Activities
<p><b>Less than expected staffing level of PMO may impact key program management tasks (Risk #201, EQA (2.13))</b></p>	<ul style="list-style-type: none"> <li>-Prioritize hiring and onboarding of three open PM positions. (completed)</li> <li>-Reach out to vendor partners and UBC community for available resources. (completed)</li> <li>-Establish accelerated process for applicant review and interviewing. (completed)</li> <li>-Fill open positions. (in-progress with target completion end of February 2019)</li> </ul>

<p><b>Unapproved, unfunded enterprise projects (Risk #223)</b></p>	<ul style="list-style-type: none"> <li>-Ensure completeness of enterprise critical list of applications that are required for a successful Workday deployment. (completed)</li> <li>-Assign responsibility within the IRP team for monitoring progress and coordinating activities between the projects or programs. (completed)</li> <li>-Update comprehensive IRP program plan with the necessary details and critical dates to track activities between the projects (in progress with target completion end of February 2019)</li> <li>-Meet regularly to discuss status and update plans accordingly...escalate using program governance as necessary. (planned)</li> </ul>
<p><b>Lack of a comprehensive effort-loaded plan (Risk #279, EQA (2.23))</b></p>	<ul style="list-style-type: none"> <li>Complete the development of a comprehensive plan for the program. (completed)</li> <li>-Complete the effort-loaded plan by November 30<sup>th</sup>. (completed)</li> <li>-Level resources across the plan. (in progress with target completion of end of January 2019)</li> <li>-Communicate and share by December 20th and incorporate feedback. (completed)</li> <li>-Communicate with budget and resourcing ramifications clarified by January 31<sup>st</sup>. (in progress with target completion of end of January 2019)</li> </ul>
<p><b>Not yet completed: Executive consideration of the application disposition list (Risk #282, EQA (3.53))</b></p>	<ul style="list-style-type: none"> <li>-Complete application disposition process and clarify the integration requirements in advance of the Board budget submission in March. (in progress with target completion of end of January 2019)</li> <li>-Ensure completeness of enterprise critical list of applications that are required for a successful Workday deployment. (completed)</li> <li>-Assign responsibility within the IRP team for monitoring progress and coordinating activities between the projects or programs. (completed)</li> <li>-Update comprehensive IRP program plan with the necessary details and critical dates to track activities between the projects. (in progress with target completion of end of February 2019)</li> <li>-Meet regularly to discuss status and update plans accordingly...escalate using program governance as necessary. (planned)</li> </ul>

<p><b>High number of Architect Stage deliverables moved into C&amp;P (Risk #283, EQA (2.24))</b></p>	<p>-Determine the required effort to complete the outstanding Architect stage deliverables being moved under the proposed Change Request(s) and enter the information into the effort driven project plan to determine the impact on deliverables in the Configure and Prototype stage. (in progress with target completion of end of February 2019)</p>
<p><b>Challenges in gathering/defining and documenting the functional and technical integration specifications for Human Resources and Finance (Risk #285, EQA (3.54))</b></p>	<p>-Ensure integration deliverables for functional and technical specifications are identified, defined, documented and understood. (in progress with target completion of end of January 2019)</p>
<p><b>Delivery Impacted due to Changes in Workday Product Roadmap (Risk #224, EQA (3.13))</b></p>	<p>-Continue to collaborate with Workday to monitor the Student Application Development Roadmap and their progress against UBC's required functionality. (in progress and on-going)</p> <p>-Integrate monitoring of the Workday Student functionality roadmap as part of PMO activities; document issues or concerns as soon as they arise. (completed)</p>



**COSTS COSTS**

Capital & Lifecycle  
Operating

The program budget is On Track for FY 18/19. Costs that were anticipated in the current fiscal year will now impact FY 19/20 due to timing. We anticipate our FY 18/19 costs to be slightly under the budgeted amount do to the delay with the FERIC renovations. IRP is currently composing budget materials for the final program budget to be reviewed at the April 2019 Board meeting.

**Financial Report - Executive Summary**

(in thousands)	Year to Date, December 2018			Annual FY18/19		
	Actuals	Budget	Variance	Forecast	Budget	Variance
UBC Resource Costs	9,200	10,363	1,163	14,990	14,836	(154)
Business Advisory Costs	-	1,280	1,280	268	2,231	1,963
External Prime Consultants	12,335	17,114	4,779	22,230	25,570	3,340
Other Costs*	7,910	10,089	2,179	13,040	12,470	(570)
<b>Total expenses before contingency</b>	<b>29,445</b>	<b>38,846</b>	<b>9,401</b>	<b>50,528</b>	<b>55,107</b>	<b>4,579</b>
<b>Contingency</b>					<b>4,893</b>	<b>4,893</b>
<b>Total after Contingency</b>	<b>29,445</b>	<b>38,846</b>	<b>9,401</b>	<b>50,528</b>	<b>60,000</b>	<b>9,472</b>

**Variance analysis:**

**For Year to Date, December 2018:**

Savings at the end of Q3 of \$9.5M reflects temporary timing savings from recruiting UBC resources, business advisory costs, point solutions, and renovations that are expected to be spent in FY20-FY22, and realized savings from Prime Consultants work from conservative budget estimates and functional teams requiring less services rendered.

**Annual Forecast for FY18/19:**

The forecasted annual results are expected to be \$50.5M compared to a budget of \$60M. The variance of \$4.6M before contingency is attributed to realized savings in Prime Consultant costs and temporary timing savings in business advisory costs, offset by additional UBC Resources and additional renovation.

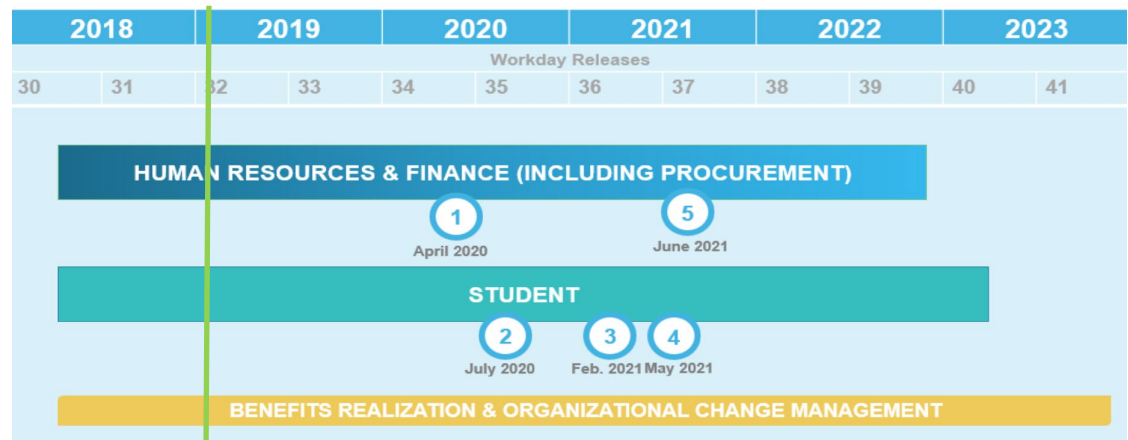
\*Other costs includes the following: governance cost, Workday subscription fees (Yr 1 residual) and platinum success package, data repository, communications, transitional network support, travel, training, renovations, software license and tools, recruiting cost, legal, computer equipment, furniture and other supplies.

**SCHEDULE PROGRAM SCHEDULE**

Implementation  
Timeline

The following represents the current timeline for all of IRP.

**PROGRAM RELEASE SCHEDULE – 5 PLANNED RELEASES\***



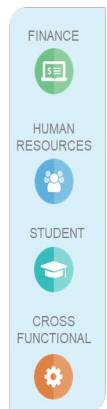
\* Workday release schedule is subject to change. HR, FIN are foundational to enable Student releases.



UBC and Workday have been engaged in due diligence to ensure our readiness to implement Student, and after having had an opportunity to do a deeper review of our requirements and their product roadmap we have identified there will be an impact on the timeline for the release of Student. The work on Student will continue with the impacts fully understood at the end of Architect Phase, currently slated for completion in March 2020. Human Resources and Finance will continue as planned with the first release slated for April 2020. UBC and Workday will identify cost/risk and mitigation strategies to minimize the impact of any delay. The breakdown of each release is detailed below. The releases At Risk are related to Student and include 2, 3 and 4.

### PROGRAM RELEASE SCHEDULE BY STREAM/SCOPE\*

Release #	Date	Stream	Scope/Functionality
1	April 2020		Capital & Asset Accounting, Institutional Accounting, Procure to Pay, Research/Post-Award Grant Admin, Revenue Accounting, Travel & Expense Management, Treasury & Cash Management
			Benefits, Compensation, Core HCM, Onboarding/Offboarding, Payroll, Talent Acquisition, Workforce Management – Time and Attendance
			Curriculum Management (Academic units, Programs of Study and foundational elements)
			Deployment of common enabling technologies: Access and Identity Management, Generic Capabilities, Reporting
2	July 2020		Curriculum Management (Courses), Admissions, Transfer Credit, Learner Management (Data), Learner Financial Management (Application Fees)
3	Feb 2021		Scheduling, Enrolment, Registration, Program Planning & Management, Progression, Learner Management
4	May 2021		Assessment Outcomes, Learner Financial Support, Learner Financial Management, Graduation
5	June 2021		Budget Development & Forecasting



<b>Previous Report Date</b>	<b>November 26, 2018</b>
	<b>INTEGRATED RENEWAL PROGRAM – FINANCE/HR/STUDENT</b>
<b>Decision</b>	1. Information Only Provide New Program Director’s Assessment
<b>Action / Follow Up</b>	Execute FY18/19 Plan & Provide Status Reports to Board of Governors
<b>Previous Report Date</b>	<b>September 27, 2018</b>
	<b>INTEGRATED RENEWAL PROGRAM – FINANCE/HR/STUDENT</b>
<b>Decision</b>	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
<b>Action / Follow Up</b>	Provide New Program Director’s Assessment

<b>Previous Report Date</b>	<b>June 14, 2018</b>
	<b>INTEGRATED RENEWAL PROGRAM – FINANCE/HR/STUDENT</b>
<b>Decision</b>	<ol style="list-style-type: none"> <li>1. Information Only</li> <li>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</li> </ol>
<b>Action / Follow Up</b>	Execute FY18/19 Plan & Provide Status Reports to Board of Governors
<b>Previous Report Date</b>	<b>April 19, 2018</b>
	<b>INTEGRATED RENEWAL PROGRAM – FINANCE/HR/STUDENT</b>
<b>Decision</b>	IT IS HEREBY REQUESTED that the UBC Board of Governors approves an FY18/19 funding release of \$60M for the Integrated Renewal Program.
<b>Action / Follow Up</b>	Execute FY18/19 Plan & Provide Status Reports to Board of Governors
<b>Previous Report Date</b>	<b>February 15, 2018</b>
	<b>INTEGRATED RENEWAL PROGRAM – STUDENT/HR/FINANCE</b>
<b>Decision</b>	<ol style="list-style-type: none"> <li>1. Information Only</li> <li>2. Status Update on (1) Negotiation Summary, (2) Program Governance, (3) Organizational Change Management, (4) Risk &amp; Issue Management, and (5) Budget.</li> </ol>
<b>Action / Follow Up</b>	Complete Next Steps to Establish Integrated Program as Outlined.
<b>Previous Report Date</b>	<b>December 5, 2017</b>
	<b>INTEGRATED PROGRAM UPDATE – STUDENT/HR/FINANCE</b>
<b>Decision</b>	<ol style="list-style-type: none"> <li>1. Proceed to negotiations with Workday for an enterprise solution for Student, HR and Finance based upon the results of a fit-gap analysis.</li> <li>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.</li> </ol>
<b>Action / Follow Up</b>	Complete Next Steps to Establish Integrated Program as Outlined.
<b>Previous Report Date</b>	<b>September 21, 2017</b>
	<b>INTEGRATED PROGRAM – SASI/HR/FINANCE UPDATE</b>
<b>Decision</b>	<ol style="list-style-type: none"> <li>1. Proceed to Negotiations with Workday and Deloitte for Student Solution.</li> <li>2. Conduct a Comprehensive Fit/Gap Analysis to Assess Workday’s Ability to Meet UBC’s HR/Finance Needs.</li> </ol>
<b>Action / Follow Up</b>	Complete Next Steps to Establish Integrated Program as Outlined.

**Previous Report Date** June 6, 2017

**SASI HR FINANCE PROCUREMENT INTEGRATED PROGRAM UPDATE**

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- Decision**
1. Information Only
  2. Status Update on the Request to Establish an Integrated HR FINANCE SASI Program
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**Action / Follow Up** Complete Next Steps to Establish Integrated Program as Outlined.