



SUBJECT	Integrated Renewal Program (IRP) Student – Update
SUBMITTED TO	Finance Committee
MEETING DATE	November 19, 2021
SESSION CLASSIFICATION	Recommended session criteria from Board Meetings Policy: OPEN
REQUEST	For information only - No action requested
LEAD EXECUTIVE	Lesley Cormack, Deputy Vice-Chancellor and Principal, UBC Okanagan
SUPPORTED BY	Peter Smailes, Vice-President Finance & Operations Andrew Szeri, Provost and Vice-President Academic, UBC Vancouver Ananya Mukherjee Reed, Provost and Vice-President Academic, UBC Okanagan Kate Ross, Associate Vice-President Enrolment Services and Registrar Jennifer Burns, Chief Information Officer & AVP Information Technology Ian Cavers, Associate Dean, Computer Science Elana Mignosa, Associate Vice-President, Finance & Operational Excellence Jennifer Kain, Chief Audit and Risk Officer Janice Stewart, Associate Dean, Innovation and Strategy, Faculty of Arts Patricia Lasserre, Associate Professor, Computer Science, Faculty of Science, UBCO Cam Gray, Executive Director, HR Operational Excellence Corinne Pitre-Hayes, Program Director, Integrated Renewal Program Laura Wecker, Manager Program Administration & Internal Communications

PRIOR SUBMISSIONS

The subject matter of this submission has been considered on a number of prior occasions. The following represent the most recent: [September 8, 2021 \(OPEN SESSION\)](#) and [September 8, 2021 \(CLOSED SESSION\)](#).

EXECUTIVE SUMMARY

Since 2018, the University has been pursuing a Board-approved strategy to replace the current Student Information System (SIS) with Workday's Student solution.

On April 26, 2021, the Board approved replacement of the current SIS and a funding release of \$54.4 million for fiscal year 2021-2022. The Board of Governors requested IRP Student leadership to complete an independent third-party review assessing risks, costs, and the implementation plan, and return to the Board in June 2021 with a final recommendation and budget for a new SIS ecosystem once the review was complete.

The independent third-party review was completed in June 2021 by PwC. The report concluded, “the program has been well planned, based on information available to date, with appropriate stakeholder engagement and consideration of risks.” PwC provided recommendations and highlighted areas to monitor. On June 24, 2021, the Board approved replacement of the current SIS and granted Board 3 approval for implementation of the Student components of the Integrated Renewal Program within a total budget envelope of \$284.9 million (including contingency).

The weekly Status Report shows the Budget as green and Resources have returned to green from amber as our wave 1 hiring target of 80% was met.

At previous meetings, concerns were raised regarding scope versus schedule. The Schedule has now transitioned from green to amber. This change is largely due to timeline misalignment within the overall Consolidated Plan that was uncovered during the Consolidated Plan update workshop held in mid-October. The Student Leadership Team (SLT) are working diligently in a number of subsequent workshops to ensure alignment and confirm IRP Student has a sound and achievable Consolidated Plan and to ensure milestones are met. Program status is regularly shared with program sponsors, and the team have received strong support from sponsors as they work through the revision process.

Resources are now trending green. Recruitment has increased steadily since a focused campaign was implemented to move recruitment numbers from 60% percent of external hires with offers accepted to 80% by September 30, 2021. To reach a larger external candidate pool HR worked with recruitment agencies and posted on popular job sites such as Indeed.

APPENDICES

1. Status Report
2. IRP Program Recruitment Update and Financial Snapshot
3. Financial Report for IRP Student
4. Conclusion & Next Steps

PRESENTATIONS

1. IRP Student Update

STATUS REPORT

The IRP Student Program is a large and complex project that comes with a number of risks. The PMO continues to refine the Status Report based on user feedback to increase transparency and clarity. The IRP Student Status Reports are produced weekly, and are shared with program leadership, including Steering and Executive Sponsors. The first page of the report is the program snapshot that shows the overall health of program scope, resources, and schedule. It also includes a summary of the current week's key accomplishments and the key upcoming activities for the following week.

Previously Resources were amber, as hiring was not occurring at the expected pace. HR set an ambitious goal of reach 80% of external hires with an accepted position. After a focused effort by both HR and hiring managers we have reached our target of 80% and Resources have returned to green. As of mid-October, Schedule shifted from green to amber. This change is largely due to scheduling challenges that were unveiled during the refinement of the Consolidated Plan. There is a mitigation plan in place that aligns with Milestone 1.

The Student Leadership Team (SLT) continues to work through the Consolidated Plan and has additional upcoming working sessions booked. The SLT have asked for support from Sponsors to allow them to work through and address the current scheduling challenges. Recommendations from the program team will be brought forward to sponsors.

The Program is tracking no Very High risks, and three High Risks. The top risks being monitored include:

- Program resource availability / productivity
- Education Planner BC (EPBC) and Association of Registrars of the Universities and Colleges of Canada (ARUCC) relationship impacting transcript design
- Scope & Requirements for Regulatory Reports to be defined and finalized

IRP STUDENT PROGRAM STATUS

PREPARED BY IRP PMO, PERIOD ENDING WEDNESDAY, OCTOBER 27

Program Health

Scope: ✓ ✓ →	Resources: ✓ ✓ →	Schedule: ⚠ ⚠ →
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Current Status		
✓ On track		
⚠ At risk		
✗ Off track		
✓ ✓ Past / current week Status		

Projected Trend		
Receiving attention ↑		
Holding →		
Slippage imminent ↓		

Post Mitigation Score		
Very High / High		
Medium		
Low / Very Low		

Program Highlights

Key Accomplishments (This Week)

- Reviewed majority of the point solutions and functional gaps and identified sequencing of key activities across all teams
- Interviews are in progress; filled 85% [+2%] (200 of 236) wave 1 positions

Upcoming Activities (Next Week)

- Program Milestone 1 review scheduled on Nov. 4; dry run walkthrough with SLT on Nov. 2
- Preparation for upcoming review sessions and materials to be submitted as recommendations to SLTA and Steering

Snapshot of Top Risks and Issues

Risk Heat Map

Current Probability	Risk Heat Map					Total
	VLO	LO	MED	HI	VHI	
VHI			2	1		3
HI		1	15	5		21
MED		6	11			17
LO	1	3				4
VLO	1					1
Total	2	10	28	6		46

New Risks and Issues – Attention Required

Risk Count – Weekly Variance [+0]

- None

Top Focus

Schedule

- Schedule status remains amber due to Consolidated Plan refinement
- Structured process to return schedule to green in alignment with Milestone #1 (Oct. 31)

Recruitment

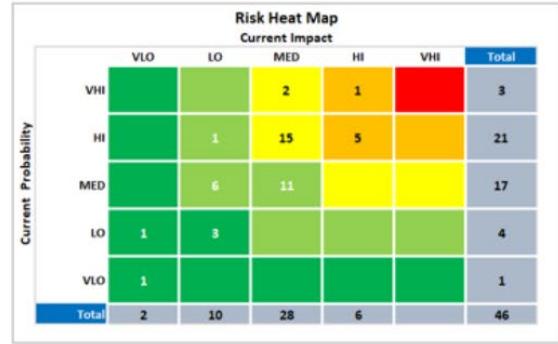
- Wave 1 Hiring
 - 77% [+2%] of offers accepted
 - 5 offers accepted week to week

Leadership Support / Action Required

- Continued support to allow SLT to work through the current schedule challenges; feedback and support for recommendations to address schedule issues

PROGRAM RISK REGISTER

PERIOD ENDING WEDNESDAY, OCTOBER 27



Risks	Action Plan
Current Top Risks (Score > High)	
<u>Risk 50</u> – Program resource availability / productivity ⓘ There is a risk to the program timeline if program resources are not available and onboarded sufficiently to fulfill planned project tasks by their due dates.	
<u>Risk 40</u> – Scope & requirements for Regulatory Reports to be defined and finalized ⓘ The Scope, Requirements & Inventory for Regulatory Reports have not yet been developed for the Program. There is a risk that we will not be able to deliver the Reports in time for go live.	Update*: <ul style="list-style-type: none"> Risk response will be discussed as a result of the Consolidated Plan refinement in the first week of Nov. Next review date – Nov. 3, 2021
<u>Risk 38</u> – EPBC and ARUCC relationship impacting Transcript design ⓘ As a result of delays in the establishment of the EPBC and ARUCC relationship, we are unable to move forward in the design for the MyCreds body of work due to the absence of technical documentation for MyCreds leading to the inability to meet the implementation timeline.	Update: <ul style="list-style-type: none"> Received NDA documents from ARUCC and currently waiting on UBC Legal for their review. Next review date – Nov. 3, 2021

IRP PROGRAM RECRUITMENT UPDATE

Resources are now trending green. Recruitment has increased steadily since a focused campaign was implemented to move recruitment numbers from 60% percent of external hires with offers accepted to 80% by September 30th. To reach a larger external candidate pool HR worked with recruitment agencies and started posting on popular job sites such as Indeed. To maximize online interaction job descriptions were reviewed and “jazzed up” by IRP Internal Communications. The forecast for October 20 shows the IRP will be at approximately 80% of external hires with offers accepted. Significant progress has been made through team work and collaboration and the program feels staff levels are in a healthy state, allowing Resources to transition back to green from amber.

PROGRAM RECRUITMENT PROGRESS

PERIOD ENDING WEDNESDAY, OCTOBER 27

Wave 1 - External Hiring into Positions		
	98%	% Position Posted
	GREEN	Overall Status
	77%	Offers Completed
Wave 1 - External Hiring into Positions		
	Actual	Planned
Approved for Hiring inside IRP	158	159
Job Descriptions Completed	158	159
Position Approved by Compensation and HR	157	159
Jobs posted in WD	156	159
Offers Made	128	159
Offers Accepted	123	159

Recruitment Update:

- 5 expected offers for this week
- Received 180 net new applications since last week for Wave 1 & Wave 2 positions
- 2 resignations week to week
- Involved PMs on Technical Delivery Recruitment

HR Action Plan:

- Wave 2 hiring commenced for Ecosystem, Technical Delivery, and TCM
- Start building out wave 2 recruitment dashboard
- Conducting reference checks
- Continuing to refresh job postings

FINANCIAL SNAPSHOT

The overall IRP Student program budget was approved by the Board of Governors on June 24, 2021 and is expected to be completed on budget.

For Year to Date, as of September 2021 Savings are \$3,391k. This is mostly due to a timing variance in UBC Resources, \$3,367k. There is an additional savings of \$23k listed as other costs (licenses and tools, Learner Financial Support point solution, training, interdependent projects, premise costs, first year sustainment, and other non-labour items) due to timing variance. The positive variances in UBC Resources are timing and are mainly due to slower hiring compared to budget. They are not at a point to be crystalized into savings

The Student Leadership Team (SLT) was asked to review their budgets, including their operational plan to verify whether or not changes were necessary. This may involve shifting costs between fiscal years, delaying or moving up recruitment of certain roles, or reallocating funds now that the program is underway and leadership has a clearer understanding of program needs. The budget review was suggested by the Executive Sponsors, and will stay within the original approved budget envelope of \$285 million.

FINANCIAL REPORT FY21/22 – EXECUTIVE SUMMARY

(in thousands)	For the month of Sep-2021			Year-To-Date Sep-2021			Annual FY 2021/22			Overall Program ¹		
	Actual	Budget	Variance	Actual	Budget	Variance	Forecast	Budget	Variance	Forecast	Budget	Variance
UBC Resource Costs	1,735	2,523	788	6,889	10,257	3,367	28,431	28,431	-	151,590	151,590	-
External Prime Consultants	-	-	-	1,864	1,864	(0)	5,799	5,799	-	25,390	25,390	-
Other Costs	718	725	8	1,869	1,892	23	6,148	6,148	(0)	29,946	29,946	(0)
Total expenses before contingency	2,453	3,248	796	10,623	14,014	3,391	40,379	40,379	(0)	206,926	206,926	(0)
Contingency - approved allocation	-	-	-	-	-	-	-	-	-	-	-	-
Contingency Remaining	-	-	-	-	-	-	-	13,764	13,764	-	78,000	78,000
Total after Contingency	2,453	3,248	796	10,623	14,014	3,391	40,379	54,143	13,764	206,926	284,926	78,000

Variance analysis:

For the month of September 2021:

Savings are **\$79k** due to:
\$78k UBC Resources
- timing variance
\$0k Prime Consultants
- timing variance
\$8k Other Costs
- timing variance

For Year to Date, September 2021:

Savings are **\$3,391k** due to:
\$3,367k UBC Resources
- timing variance
\$0k Prime Consultants
- timing variance
\$23k Other Costs
- timing variance

Annual Forecast for FY21/22:

Not applicable, no variance forecasted

Overall Program:

Not applicable, no variance forecasted

¹ The overall IRP Student program budget was approved by the Board of Governors on June 24, 2021
Forecast based on info available as at October 5, 2021

Other costs include licenses and tools, Learner Financial Support point solution, training, interdependent projects, premise costs, first year sustainment, and other non-labour items.

Forecast based on information available as at October 5, 2021

FINANCIAL REPORT FY21/22 – EXECUTIVE SUMMARY W/ LTD

(in thousands)	FY18/19			FY19/20			FY20/21			FY21/22 Year-To-Date, Sep-2021			Overall Program ¹			
	Actual	Actual	Actual	Actual	Budget	Variance	Life-To-Date	Forecast	Budget	Variance						
UBC Resource Costs	3,134	4,491	3,739	6,889	10,257	3,367	18,252	162,953	162,953	-						
External Prime Consultants	1,914	4,760	5,273	1,864	1,864	(0)	13,811	37,337	37,337	-						
Other Costs	2,431	183	390	1,869	1,892	23	4,873	32,950	32,950	-						
Total expenses before contingency	7,479	9,434	9,401	10,623	14,014	3,391	36,937	233,240	233,240	-						
Contingency - approved allocation	-	-	-	-	-	-	-	-	-	-						
Contingency Remaining	-	-	-	-	-	-	-	-	-	78,000	78,000					
Total after Contingency	7,479	9,434	9,401	10,623	14,014	3,391	36,937	233,240	311,240	78,000						

Variance analysis:

For Year to Date, September 2021:

Savings are **\$3,391k** due to:

\$3,367k UBC Resources

- timing variance

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Overall Program:

Not applicable, no variance forecasted

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CONCLUSION & NEXT STEPS

The Student Leadership Team is working towards a revised edition of the Consolidated Plan by the end of October, this Plan will be an evolving document as work is uncovered or tasks are completed ahead of time. The team continues to work towards successfully delivering Program Milestone 1. Program Wave 1 hiring will continue, and Wave 2 recruitment is underway. A Senior Financial Analyst has been hired and will be joining the team. The Analyst will provide additional support and will work with teams to provide financial analysis of budgets and program spending.

IRP Student Update

Finance Committee

November 2021 – Open Session

Lesley Cormack, Deputy Vice-Chancellor and Principal, UBC Okanagan

Peter Smailes, Vice-President Finance & Operations

Andrew Szeri, Provost and Vice-President Academic, UBC Vancouver

Ananya Mukherjee Reed, Provost and Vice-President Academic, UBC Okanagan

Kate Ross, Associate Vice-President Enrolment Services and Registrar

Jennifer Burns, Chief Information Officer and AVP Information Technology

Cam Gray, Executive Director, HR Operational Excellence

Corinne Pitre-Hayes, Interim Program Director, Integrated Renewal Program Student



Agenda

- Current Status
- Program Recruitment Update
- IRP Student Financial Overview
- Summary

Current Status

IRP STUDENT PROGRAM STATUS

PREPARED BY IRP PMO, PERIOD ENDING WEDNESDAY, OCTOBER 27

Program Health

Scope: → Resources: →

Schedule: →

Current Status
On track
At risk
Off track
Past / current week Status

Projected Trend
Receiving attention ↑
Holding →
Slippage imminent ↓

Post Mitigation Score
Very High / High
Medium
Low / Very Low

Program Highlights

Key Accomplishments (This Week)

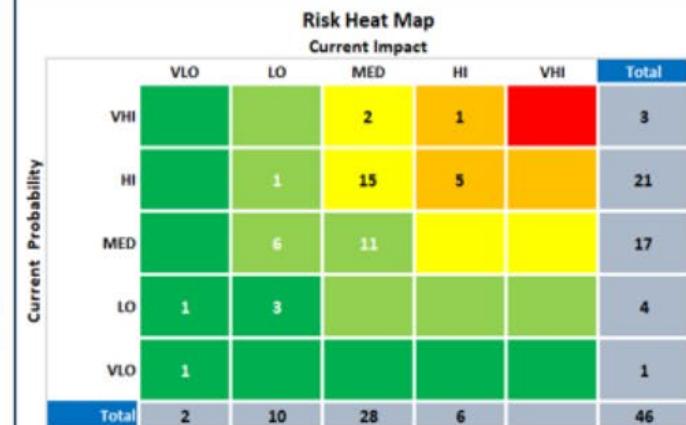
- Reviewed majority of the point solutions and functional gaps and identified sequencing of key activities across all teams
- Interviews are in progress; filled 85% **[+2%]** (200 of 236) wave 1 positions

Upcoming Activities (Next Week)

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Snapshot of Top Risks and Issues

Risk Heat Map



New Risks and Issues – Attention Required

Risk Count – Weekly Variance **[+0]**

- None

Top Focus

Schedule

- Schedule status remains amber due to Consolidated Plan refinement
- Structured process to return schedule to green in alignment with Milestone #1 (Oct. 31)

Recruitment

- Wave 1 Hiring
 - 77% **[+2%]** of offers accepted
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Leadership Support / Action Required

- Continued support to allow SLT to work through the current schedule challenges; feedback and support for recommendations to address schedule issues

Program Recruitment Update



PROGRAM RECRUITMENT PROGRESS

PERIOD ENDING WEDNESDAY, OCTOBER 27

Highlights	Wave 1 - External Hiring into Positions	
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	GREEN	Overall Status
	77%	Offers Completed

Wave 1 - External Hiring into Positions			
	Actual	Planned	Percentage
Approved for Hiring inside IRP	158	159	99%
Job Descriptions Completed	158	159	99%
Position Approved by Compensation and HR	157	159	99%
Jobs posted in WD	156	159	98%
Offers Made	128	159	81%
Offers Accepted	123	159	77%

Recruitment Update:

- **5 expected offers** for this week
- Received **180 net new applications** since last week for Wave 1 & Wave 2 positions
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HR Action Plan:

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Financial Snapshot – September Financials

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Variance analysis:

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Savings are **\$796k** due to:

\$788k UBC Resources

- timing variance

\$0k Prime Consultants

- timing variance

\$8k Other Costs

- timing variance

For Year to Date, September 2021:

Savings are **\$3,391k** due to:

\$3,367k UBC Resources

- timing variance

\$0k Prime Consultants

- timing variance

\$23k Other Costs

- timing variance

Annual Forecast for FY21/22:

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Overall Program:

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Financial Snapshot – September Financials Cont'd

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Summary

- Current overall status is green for scope, and resources has shifted back to green due to positive results from focused recruiting efforts
- Overall status for schedule has shifted to amber due to schedule challenges that have surfaced as we refine the Consolidated Plan – mitigation in place aligned with Milestone 1
- Framework to guide decisions on Scope versus Schedule trade-offs is in discussion with Enterprise Risk and Assurance (ERA)
- For Year to Date, as of September 2021 Savings are \$3,391k. This is mostly due to a timing variance in UBC Resources
- HR continues to work with leaders to fill critical roles, and has begun the process of posting and hiring for wave 2.
- Resourcing statistics will be monitored carefully and changes in status will be highlighted to all leadership teams.

CONTACT

The Integrated Renewal Program -
Student would love to hear from you! If
you have any questions or comments
please get in touch.

WEBSITE | <http://irp.ubc.ca>

CONTACT | [Corinne Pitre-Hayes](#)