



SUBJECT	Integrated Renewal Program (IRP) Student - Update
SUBMITTED TO	Finance Committee
MEETING DATE	September 20, 2022
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	Karamjeet Heer, Interim Vice-President Finance Gage Averill, Provost and Vice-President Academic pro tem Rehan Sadiq, Provost and Vice-President Academic pro tem, UBC Okanagan Kate Ross, Associate Vice-President Enrolment Services and Registrar Joanne Fox, Principal and Academic Director, UBC Vantage College Jennifer Burns, Chief Information Officer and AVP Information Technology Ian Cavers, Lead Academic Sponsor Elana Mignosa, Associate Vice-President Finance & Operational Excellence Jennifer Kain, Chief Audit & Risk Officer Janice Stewart, Associate Dean, Innovation and Strategy, Faculty of Arts Patricia Lasserre, Associate Professor, Computer Science, Faculty of Science, UBC Okanagan Cam Gray, Executive Director, HR Operational Excellence Carri Lawrence, Director, Financial Operations, UBC Okanagan Corinne Pitre-Hayes, Program Director, Integrated Renewal Program Laura Wecker, Manager, Program Administration & Internal Communications

PRIOR SUBMISSIONS

The subject matter of this submission was most recently considered by the Finance Committee on [June 15, 2022](#). IRP Student provided an overall program update, and highlighted program activities.

EXECUTIVE SUMMARY

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

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 approval request included a release of \$54.4 million for 2021-2022. Subsequently, the Board approved a release of \$84.0 million for 2022-2023. These funding release requests are unchanged from the initial projection provided to the Board on June 24, 2021.

Since that time the IRP Student program has continued to forge ahead and accomplished a great deal. Wave 3 of hiring is on track, and both Scope and Resources are green on the Status Report. Schedule remains red as the team completed the Milestone 3 Review at the end of July, with detailed results included in the report below. Overall Milestone 3 was a great success with 98% of items achieving a Pass or Conditional Pass. However, there are a number of items, both critical and non-critical from Milestone 3, that were moved to Milestone 4 for completion. The Milestone 3 Review highlights the substantial work ahead in Milestone 4 which will be critical for meeting our timeline. To reduce the risk to the timeline and to ensure Program success the Program Senior Leadership Team (SLT) in conjunction with the PMO are preparing for Milestone 4, which will conclude at the end of November 2022.

Cross-Platform work and the Transition to Operations plans are underway. The Transformation and Change Management Team is establishing and connecting with the Transition Network across campuses and preparing a training strategy.

The workload has been significant and continues to grow. IRP Student shows pride and ownership of work and the team continues to work diligently through difficult circumstances. The focus remains on meeting Milestone timelines and delivering Workday Student to the UBC Community.

APPENDICES

1. Current Status
2. Milestone 3 Review – Final Results
3. Milestone 4
4. Top Risks & Issues
5. Cross Platform
6. Transition to Operations
7. Transformation & Change Management (TCM) Update
8. Financial Report FY22/23 – Executive Summary
9. Conclusion & Next Steps

PRESENTATIONS

1. IRP Student Update



CURRENT STATUS

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 which 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.

IRP Student leadership completed the Milestone 3 Review on July 28, 2022. Much of the current Key Accomplishments and Upcoming Activities have been focused on the Milestone 3 Review and preparing for Milestone 4.

As part of the second Milestone Review, leadership identified a significant number of deliverables ahead for future Milestones and bottlenecks in certain areas that if not resolved could cause a delay to the scheduled deployment. This insight caused the Schedule status to shift from amber to red. Schedule will remain red while Milestone 3 wraps up and planning and preparation continues for Milestone 4.

No changes in Scope have been identified at this point. As Milestone 3 concludes some resequencing will be required to accommodate the items that were conditionally passed or incomplete. The timeline remains a challenge, however the Senior Leadership Team (SLT) are actively engaged in the plan and are working collaboratively to identify and solve any gaps or bottlenecks. The SLT and the IRP Student staff continue to show dedication and flexibility and are invested in the success of the program.



IRP STUDENT PROGRAM STATUS

PREPARED BY IRP PMO, PERIOD ENDING WEDNESDAY AUGUST 24 2022

Program Health

Scope: →
 Resources: →
 Schedule: →

Current Status On track At risk Off track Past / current week Status	Projected Trend Receiving attention ↑ Holding → Slippage imminent ↓	Risk Scoring Metrics Very High High Medium Low Operations Risks
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Key Accomplishments (This Week)

- Milestone 4 plan alignment with Consolidated Plan is in progress
- M4 reporting mechanism has been established, awaiting final plan details
- First round of cross-checking of detail plans is complete, further work needed for M4 planning
- First Milestone 3 non-Pass item follow-up reporting has been initiated

Upcoming Activities (Next Week)

- Completing M4 planning and detailed plan alignment.
- Completing the M4 milestone progression charts for Status Reporting
- Developing the Milestone 4 review process

Top Focus

Schedule

- Schedule status remains Red
- M4 milestone planning in progress, applying M3 lessons learned
- Follow-up actions from monthly check-in

Resourcing

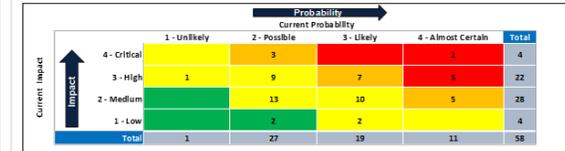
- Mitigation for increase in risks and issues related to resourcing needs in the past month (1 Risk – LFS 2 Risks – SCH, 2 Issues – SADR and 2 Issues – TC & ADM)

Leadership Support or Action Required

- Support for community engagement and feedback
- Endorsement for community support framework and funding

Top Risks and Issues

Inherent Risk Heat Map



Active Risk Count – Weekly Variance [-2]

Very High Risks and Issues

New Very High Score Risk:

- None

Response Plan Executed:

- None

New Very High Score Issue:

- None



Resources remain green, as the program is in the midst of wave 3 of hiring. Wave 3 hiring is progressing as planned, postings continue to receive a steady number of applications and interviews are underway for the posted positions. The project is seeing increased turnover across the functional areas, but churn remains manageable at this time. IRP Student continues to remain competitive in the market by offering remote work options. As wave 3 moves forward trends suggest the need to hire contractors for some outstanding, hard to fill positions. IRP Student did account for this possibility during the budgeting phase. A reserve was included in the budget to cover costs for hiring contractors if and when needed. At this time a very small percentage of the program team are contractors, with the majority having become employees.

PROGRAM RECRUITMENT PROGRESS

PERIOD ENDING WEDNESDAY AUGUST 24 2022

IRP Student Recruiting Dashboard Week ending:		Date: 8/24/2022					
Snapshot of IRP Student recruiting progress is highlighted below							
WAVE 3 PERIOD: 06/01/2022 - 11/30/2024							
Highlights		Wave 3 - Internal Hiring into Positions		Highlights		Wave 3 - External Hiring into Positions	
	N/A	% Position Posted			57%	% Position Posted	
	GREEN	Overall Status			GREEN	Overall Status	
	N/A	Offers Completed			40%	Offers Completed	
Percent Complete (per position) by key stage gate of recruiting							
Wave 3 - Internal Hiring into Positions				Wave 3 - External Hiring into Positions			
	Actual	Planned	Percentage		Actual	Planned	Percentage
Approved for Hiring inside IRP	6	6	N/A	Approved for Hiring inside IRP	98	105	93%
Job Descriptions Completed	6	6	N/A	Job Descriptions Completed	64	105	61%
Position Approved by Compensation	6	6	N/A	Position Approved by Compensation and HR	62	105	59%
Position Approved by HR and in WD	6	6	N/A	Jobs posted in WD	60	105	57%
Offers Made	4	6	N/A	Offers Made	43	105	41%
Offers Accepted	4	6	N/A	Offers Accepted	42	105	40%
Recruitment Update				HR Action Plan and Outlook			
<ul style="list-style-type: none"> August 17 2022 to August 24 2022 = Received 140 since last week for all positions posted Expected offers this week (2): Senior Change Management Specialist- CEP, TCM <ul style="list-style-type: none"> QA Analyst (Co-op), QA – not reflected in stats above because 2 Co-op students share 1-line item. Offers made: 41% 1 resignations: Test Automation Engineer, QA (Co-op) – Personal reason: co-op student ended co-op term earlier than anticipated. 0 offers declined. <p>Workstream Updates:</p> <ul style="list-style-type: none"> QA: interviewing for QA Analyst II – potentially co-op students. Recruitment efforts continued. ECO: Senior BA – recruitment in progress. TECH: Recruitment underway for outstanding positions: Senior Developer and Developer II. PM II, Special Reporting- hired. On track. TCM: Senior Change Management Specialist- CEP – references underway. Learning Rover Co-op JD about to be posted. STU: PM II, STU – final interview underway. SADR: BA II, Data & Reporting (1)- recruitment underway. Additional BA II, Enterprise Data Governance recruitment underway. Senior BA & BA II (incremental roles)- posted. Senior Manager, Security and Access- prescreens underway. PMO: Benefits Realization Strategist - hired. PM I- prescreens underway. 				<ul style="list-style-type: none"> Continue expediting reference checks and offer letters Reminders sent for upcoming performance reviews and associated probationary/MPI increases. Merit increases approved, please send the completed performance reviews to HR. HR weekly status reporting is under review 			

The IRP Student Team are focused and working hard to meet timelines and have embraced the One Program approach.

MILESTONE 3 REVIEW – FINAL RESULTS

Milestone 3 had a significant deliverables count, with 258 deliverables identified. To demonstrate the increase in work in comparison Milestone 2 was compiled of approximately 100 deliverables. Of the 258 planned deliverables 98 were branded Critical Deliverables, which are items that provide crucial functionality to meet the timeline and launch Workday Student in fall 2023.

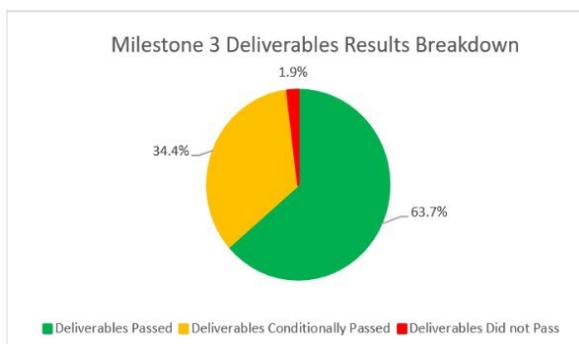
The final results show IRP Student achieved our goal of completing 80%+ of Milestone 3 deliverables by July 29, 2022.

Overall count: Of 259 items 254 (98%) received a Pass or Conditional Pass, and 4 items (1.5%) Did Not Pass.

Breakdown:

- Pass – 165 or 63.7%
- Conditional Pass – 89 or 34.4%
- Did Not Pass – 5 or 1.9%

The results demonstrate the highly dedicated and effective teams we have in place who are tackling each phase with creativity and curiosity, however the numbers also highlight the program has a long way to go.



Prior to the Milestone Review, PMO and the Student Leadership Team redefined the criteria for Pass, Conditional Pass, and Did Not Pass. To receive a Pass, the work was completed, ready for downstream work, and was signed off. A Conditional Pass required a minimum 80% of work was completed, downstream teams were able to use the data and a completion date was identified. A higher number of Conditional Pass items were expected in Milestone 3, due to the definition update as well as the higher number of deliverables. Did Not Pass meant the 80% completion rate was not met. This is the first instance of items not passing in a Milestone Review for IRP Student. Both the Conditional Passes and the deliverables that Did Not Pass will be moved into Milestone 4. Majority of Conditional Passes moving to Milestone 4 are expected to be completed in August or September, with a few exceptions.

	Total	Critical Deliverables	Non Critical Deliverables
Pass	63.7%	23.2%	40.5%
Conditional Pass	34.4%	17.4%	17%
Did not Pass	1.9%	1.9%	0%
Totals	100%	42.5%	57.5%

Overall 63 items were moved from Milestone 3 into Milestone 4. 17 (11%) of those were M3 critical items, and 46 (33%) were non-critical.

As of August 19, 2022, 13 items have been completed, 5 have been updated to a later date (2 Learner Financial Support items and 3 Security, Access, Data, & Reporting items), and 3 have been officially moved to Milestone 4 (Security, Access, Data, & Reporting items). The remaining items all remain on track to be completed by their revised due date, many of which are due to be completed by August 31, 2022.

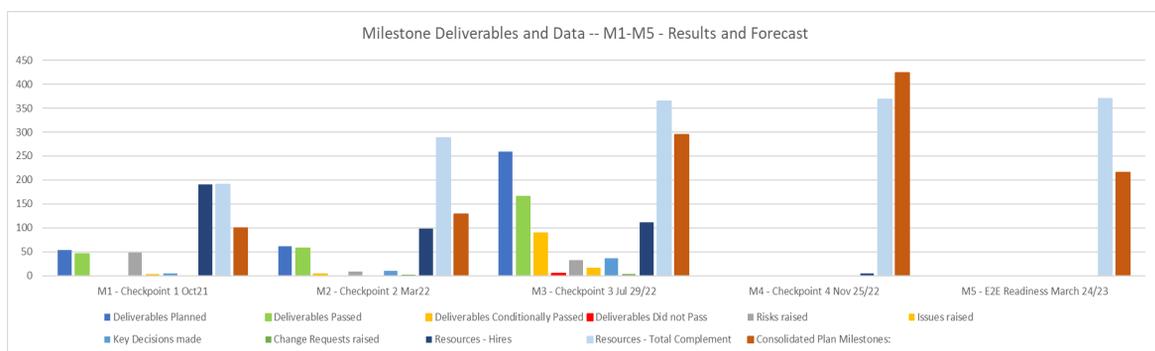
The workload for Milestone 3 was significant, not only did the program achieve its goal but through the process the teams were able to provide multiple process improvements in supporting services including Operational Support ticket resolution time and new/enhanced PMO processes. The team embraced the One Program Approach and cross team support was provided to ensure coverage on priority bodies of work, and QA support was embedded within each functional area, and UBC/Vendor relationships continued their evolution through transparency and collaboration.

A program of this complexity also presents challenges. Some of the overarching challenges continue to be: resource capacity versus the volume of work currently scheduled to be done by specific dates, decision-making timing in support of completing scheduled work on time, project plan integrations and dependency management across teams, timely access to functional resources or business subject matter experts, managing project scope, and project progress tracking across a number of trackers/reports.

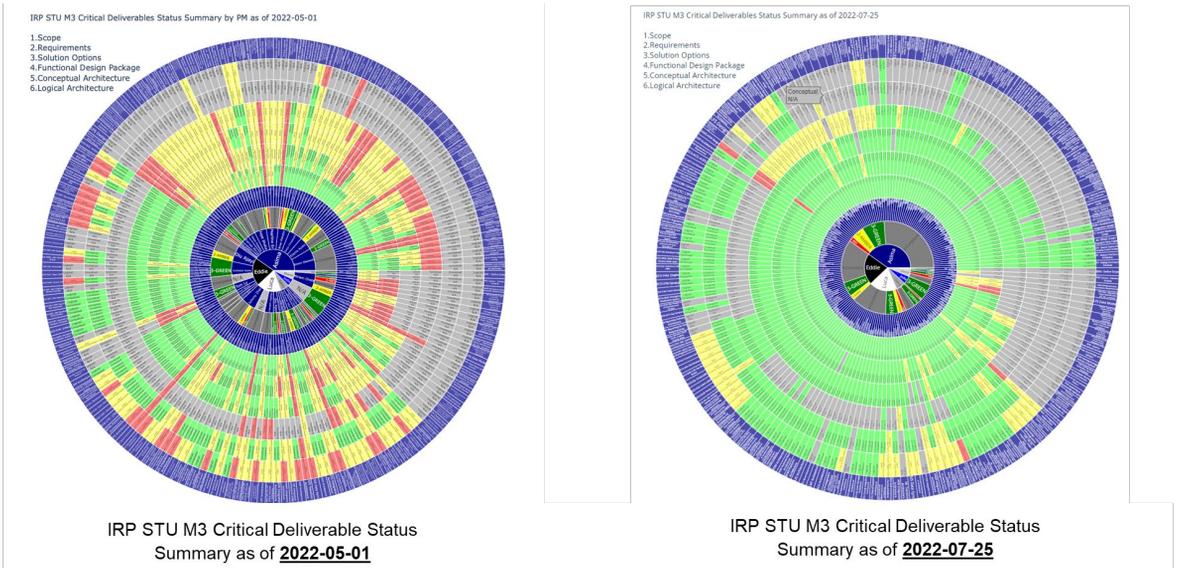
PMO continues to evolve the Milestone Review process through lessons learned through simplification and the introduction of deliverables “mini gate” reviews throughout the milestone period, rather than just one check in at the end of the milestone cycle. The next steps include finalizing the Report and getting sign off, continuing to plan Milestone 4 and identify deliverables. PMO will follow up on conditional pass and action items, and report progress on a weekly basis.

MILESTONE 4

Milestone 3 had a significant deliverables count, and the number of deliverables increases again in Milestone 4. Milestone 4 is comprised of over 400 deliverables, and with the carry over of some items from the previous milestone, the timely completion of Milestone 4 is paramount to the project’s success and maintaining the 2023/2024 launch timeline.



In depth planning sessions are underway by SLT members and opportunities for resequencing work will be leveraged, where and when appropriate. In Milestone 3 a Critical Deliverables tracker was created in Smartsheet, known as the Milestone Sunburst chart. This tracker provides a visual representation of each deliverable by owner, by focus area, and by item. As work progresses the items in the tracker shift from red, to yellow, to green. This is beneficial in that it clearly demonstrates progress, and highlights areas that are requiring additional support. An improved, more fully automated version of the Milestone Tracker will be used for Milestone 4.



Program Milestone 3 – Milestone Tracker

TOP RISKS & ISSUES

The project monitors Risks and Issues closely, reporting on both on a weekly basis. IRP Student currently shows 6 High Risks, 3 of which are SIS Operational risks which are considered to be dependencies rather than direct Program risks. The three High Risks facing the Program are the unknown data conversion scope for Point Solutions, and the delay of training material development due to the revised End-2-End testing timeline, and the departure of the LFS Project Manager.

Risks	Updates
Current Top Risks (Score = Very High)	
<p>Risk 20 - Point Solutions Data Conversion scope is unknown</p> <p>As a result of lack of clarity on the Scope for all the Business Process Gaps that will be implemented in BPMS, there is a risk that the team would not be able to deliver all on Data Conversions Activities within the allotted Program timeline which would impact the Program Schedule.</p>	<p>Recent Update:</p> <ul style="list-style-type: none"> Some Data Conversion scope for BPMS has been provided, more details are required as to the source of data. A follow-up meeting is being setup to discuss. <p>Previous Update:</p> <ul style="list-style-type: none"> Point Solution design work is part of Milestone 4 deliverables. This is when we expect to understand the scope of the Data Conversion work. The Target Response Date needs to match with M4 deadline of Nov 25. The date is being changed to match up.
<p>Risk 77 – Training materials development delayed by revised E2E testing timeline</p> <p>As a result of a revised E2E testing timeline (start delayed from Jan 1'23 to April 4'23), there is a risk of training materials for MTP1 not being finalized (refreshed) on time, which would impact the Training delivery and overall preparedness of the UBC community. This would mean increased strain on the Sustainment organization and additional work for TCM during the MTP1 Hypercare period.</p>	<p>Recent Update:</p> <ul style="list-style-type: none"> Finalizing procurement to proceed with contract and final budget approvals. <p>Previous Update:</p> <ul style="list-style-type: none"> Notice of Intent closed on Aug 8, work underway with Procurement to proceed with contract. Work underway to develop product demo that will be presented to different stakeholder groups (AMTAC, <u>SteerCo</u>, Student Solution team, etc.). TCM met with QA team to discuss E2E testing strategy and is currently analyzing the impacts on the training timelines.
<p>Risk 96 - LFS - Departure of Project Manager</p> <p>As a result of the LFS Project Manager moving to a new position within IRP, there is a risk that the project will have insufficient project management support, which would lead to ineffective management of the project and vendor management.</p>	<p>Update:</p> <ul style="list-style-type: none"> New risk

One Very High Issue has been identified, the ongoing Learner Financial System delay, with design work behind schedule, and the business objects exposure in Workday for reports.

Issues	Target Action Plan Execution Date	Updates	Progress
Open Issues = Very High			
<p>Issue 8 – LFS - Design Work Behind Schedule</p> <p>Due to resource limitations, complex design, and data model interdependencies, design work is taking longer than planned affecting the project schedule. This impacts the completion of functional design, and the team's ability to commence technical design and build which has a direct dependency. Anticipated impact varies by topic, but is several weeks behind on some key activities.</p>	<p>31 August, 2022</p> <p>29 July, 2022</p> <p>30 June, 2022</p> <p>10 June, 2022</p> <p>31 May, 2022</p> <p>14 May, 2022</p> <p>29 April, 2022</p>	<p>Recent Update:</p> <ul style="list-style-type: none"> Deloitte to present proposed phased approach to deployment within the next week. This will aim to ensure sufficient time for design, build and testing to meet our business uptake milestones. <p>Previous Update:</p> <ul style="list-style-type: none"> M4 planning underway. Re-planning session taking place with Deloitte to reschedule some paused design work and assess downstream impacts on build. Assessing a phased approach to deployment to provide more time for design and build that still meets business uptake milestones. 	

Mitigations are in place for both Risks and Issues, items continue to be tracked once they have been downgraded or a response plan has been developed and executed, to ensure PMO does not lose track of previous areas or items of concern.

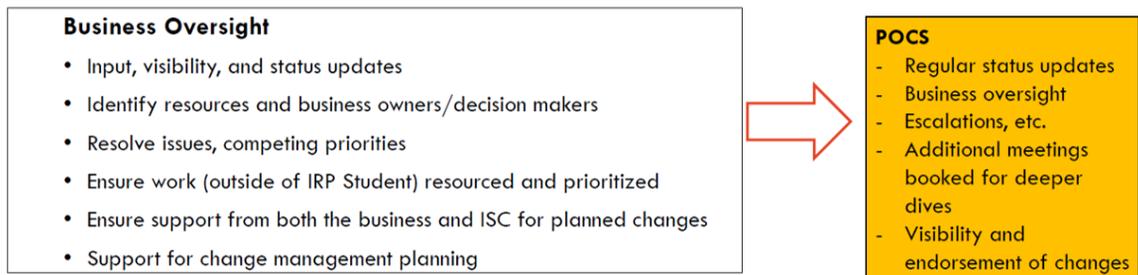
CROSS PLATFORM

Necessary changes to Workday HCM and Finance have been identified to enable Workday Student to go live. The Cross-Platform priorities were identified in 2021 and the following dependencies and impacts were identified:

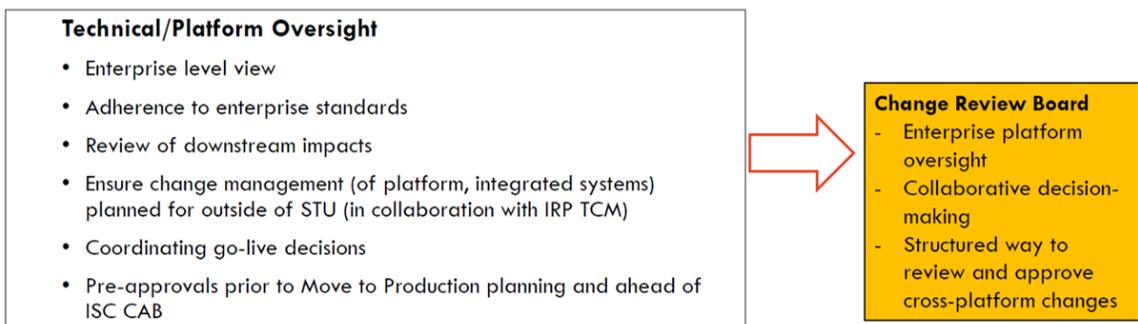
- HCM/HR - Person bio/demographic data, academic units, academic appointments, etc.
- FIN/Finance – revenue worktags, update APRs, banking info, student sponsor contracts, etc.
- Underlying platform – duplicate management, universal ID, security

To address these items additional input is required from business subject matter experts in HR & Finance, the ISC for system knowledge, and additional Workday HCM & FIN consultants. As there are downstream impacts including Data Conversion, Reporting, and Security it is important to carefully consider any changes requested to the existing platform. The Cross-Platform Framework was developed to clarify roles and responsibilities, streamline work, and ensure resource agreements are reached. Oversight is required from both a business and a technical perspective

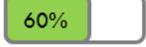
The Cross-Platform oversight and decision-making is in place and is progressing well. Business Oversight will be handled by the Policy and Outcome Committees (POCs). There are POCs for HR and Finance, and Student.



Technical and Platform Oversight is handled by the Change Review Board, which provides enterprise level oversight.



Below is the Cross Platform Status (HCM) as of July 29, 2022:

Name	Description	Status	% Complete	Status Update
Person Data	Person data is tightly integrated between FIN/HCM/STU using the same underlying objects to define attributes like Name, Gender, etc. Requires alignment.	In-progress		<ul style="list-style-type: none"> Presented deep dive on June 23rd to HRPOC Working through remaining topics EDG bringing forward additional changes
Academic Units	Updates to Academic Units (AUs) based on the validation exercise performed with the faculties.	In-progress		<ul style="list-style-type: none"> Recommendations of AU changes identified and validated. Conceptual design approved by CRB on June 22. To confirm with HR Admins any related changes e.g. Appointments
Academic Appointments	An academic appointment is required in HCM in order to designate TAs with the eligibility in STU to support teaching activities.	In-progress		<ul style="list-style-type: none"> Conceptual/logical CRB approval to automate TA appointments Technical design in progress STU will require testers, date TBD
Student Employment	Enabling HR to hire a student from the new student record (Student Object). Existing records to be converted.	Early Stages		<ul style="list-style-type: none"> Workday HCM consultant to finalize scope of work. Majority of work to occur on HCM portion of platform

Deferred, Not Started, Minimal HR involvement

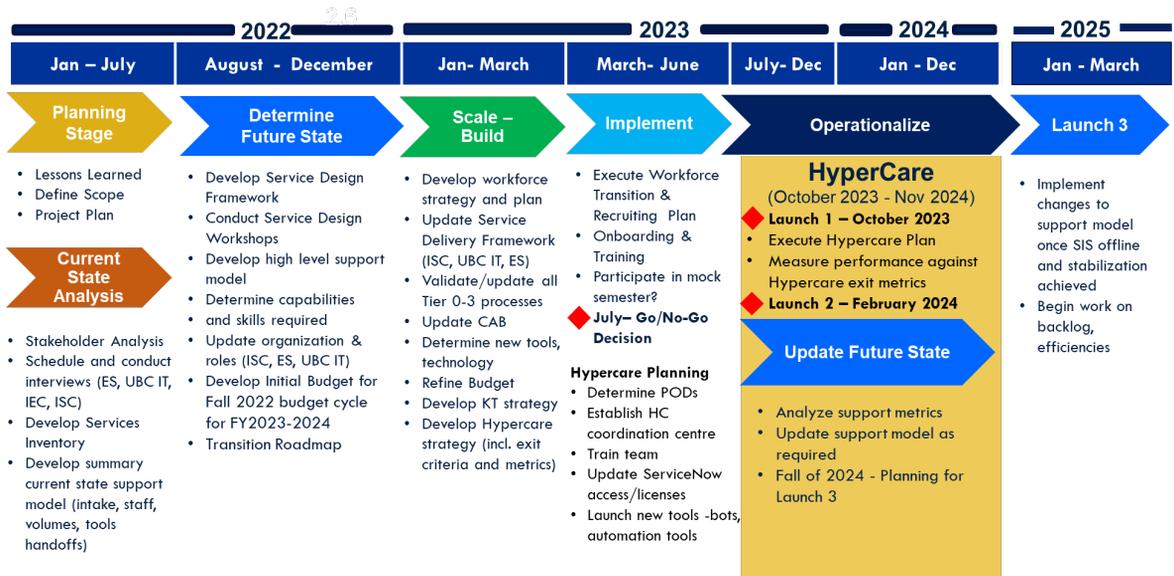
Period Activity Pay - ISIS decommission)	Decommissioning ISIS and transferring functionality to WD - to facilitate the calculations necessary to define compensation for sessionals.	Recommend Deferral		<ul style="list-style-type: none"> ISIS is currently scheduled for retrofit Faculty Relations has no capacity until next summer WD says may not meet all functionality/requirements All in agreement to defer until after STU go-live
Student Employ. Eligibility/Hiring	Eligibility rules in WD can be automated to ensure meeting eligibility requirements	Recommend Deferral		<ul style="list-style-type: none"> Stakeholder meetings to review functionality, how currently applied All in agreement to defer Eligibility Rules, revisit benefit vs. effort
Location Management	Scheduling process requires location capacity for instructional locations. There is no accurate source or data owner for all instructional location capacity. Design direction will require Student security roles to manage location capacity for instructional locations	In-progress		<ul style="list-style-type: none"> Dependencies on Workday and UBC Architecture <ul style="list-style-type: none"> Fix Building API and integration into Workday (next release) Update stale data for STU Create a Location Domain API and Location Experience API More WD, ISC involvement. This impacts HCM but not HR directly
Announcements	WD announcements are shared tenant wide, STU needs to be able to manage Student-related announcements.	Not Started		<ul style="list-style-type: none"> STU team to determine current business process, security roles and ownership for announcements in Workday (shared with HR/FIN) and what changes are needed to support STU use cases.^{Page 10}

Below is the Cross Platform Status (FIN) as of July 29, 2022

Name	Description	Status	% Complete	Status Update
Worktags for Student Revenue	FIN/STU alignment on new STU worktags.	In-progress		<ul style="list-style-type: none"> Interim monthly reclass boomerang approved to allow for alignment. Boomerang conceptual design approved by CRB. New STU Revenue FDM designed, awaiting final approval by FIN
FDM – Banking & Settlement	APRs, bank accounts and routing configured for STU. Validate/update revenue and spend categories.	In-progress		<ul style="list-style-type: none"> Configuration is complete in STU tenant. Workshops held in June to review/approve APR changes.
Collections & Write-offs	When student charges are written off a write-off reason (shared with customer accounts) is required and a STU specific APR posts the transactions.	In-progress		<ul style="list-style-type: none"> STU in process of finalizing end-to-end process. APRs don't allow posting to central accounts. STU considering reclass. Treasury has requested separation between UBCV and UBCO.
Student Refunds	Process changes for student refunds for financial awards and tuition overpayments. TouchNet integration (DPP).	In-progress		<ul style="list-style-type: none"> Initial meetings held with FIN Ops for awareness and business input. Transactions and notifications validation in upcoming workshops. New Payment Election rule approved by CRB.
Financial Aid Disbursements	Consolidating award management into one system, covering end-to-end award processes and allowing visibility. Integration between AwardCloud & FIN	In-progress		<ul style="list-style-type: none"> Configure spend categories, updates to worktag usage, APRs. Meetings with DAE and initial consult with core Finance LFS still at the conceptual design stage
Student Sponsor Contracts	The sponsor object is shared with Grants Management requiring cross-platform coordination for changes. Customer invoice validation and subsequent review.	In-progress		<ul style="list-style-type: none"> Integration and reporting impact assessments in progress. Next steps include meeting with Research Finance and Enrolment Services to approve proposed design.
Student Credit Memo	Student Credit Memo allows an admin user to create a payment to a student. Require to identify correct ledger account to use and update APRs.	In-progress		<ul style="list-style-type: none"> STU to finalize use cases.
Student Expenses	WD STU, enables EFT payment elections to student into FIN eliminating timing or data integrity issues.	In-progress		<ul style="list-style-type: none"> Initial proof of concept developed and presented Activities planning and timeline dependencies mapping in progress
Digital Payment Platform (DPP)	UBC's ePayment system to process financial transactions online to be retired alongside SIS. The replacement solution (TouchNet) requires changes that impact WD FIN. These changes will be presented to CRB for approval.	In-progress		<ul style="list-style-type: none"> Items that will be presented to the CRB include: <ul style="list-style-type: none"> New virtual bank accounts ISU / ISSG security profiles RaaS

TRANSITION TO OPERATIONS

The planning for the transition of Workday Student over to Operations is well underway. The team is partnering with the Enterprise Risk and Assurance team (ERA) and the official cross functional team kick off is scheduled for August 3. The preliminary timeline for the phases of work have been established. 2022 includes the Planning stage, understanding the “As Is” state, and the design phase, what is “To Be”. The Transition to Operations budget and plan/design is set for approval by December 2022.



Note: Draft for discussion, dates subject to confirmation.

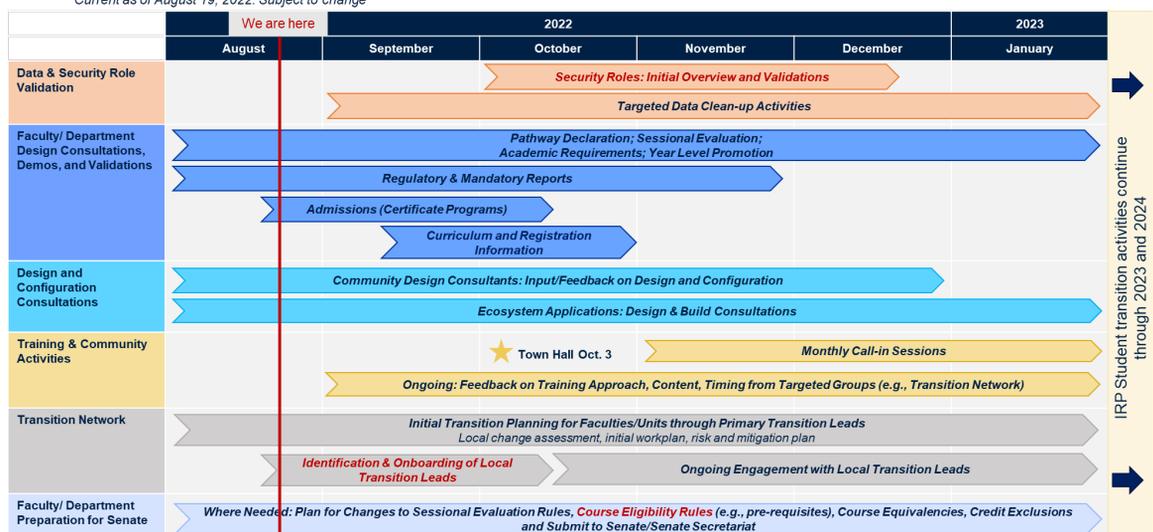
The Build and Implementation is slated for the first half of 2023, which includes staff transition, recruitment, and onboarding and training. The operationalization of the plan begins in July 2023 with the first IRP Student Launch and continues throughout 2024 including a handover and lessons learned before the expected project closure.

TRANSFORMATION & CHANGE MANAGEMENT UPDATE

The Transformation and Change Management (TCM) team continue to build up the Transition Network. During the summer months (July – September) activities include identifying, recruiting, and onboarding Local Transition Leads (LTLs), the introduction of Local Planning Tools: Transition Plan templates, Change Impact Assessments, Stakeholder Analysis and Workplans to help assess the local change impact. TCM

TCM will be conducting core activities through a variety of mediums including: check-ins, monthly/ad hoc meetings, demos and workshops, emails, and Canvas.

Current as of August 19, 2022. Subject to change



FINANCIAL SUMMARY

In June 2022, the Board of Governance's Finance Committee approved the IRP Student program Recast Budget that saw the Student Leadership Team (SLT) review their budgets, including their operational plan to update their focus area budget forecast. This included shifting costs between fiscal years, delaying or moving up recruitment of certain roles, and reallocating funds now the Program is underway. The budget remains within the original approved budget envelope of \$284.9 million.

For Year to Date, as of July 2022 Savings are \$2,339k. This is mostly due to a timing variance in UBC Resources, \$2,291k. The positive variances in UBC Resources are timing and are mainly due to slower hiring compared to the budget. The additional \$48k are related to Other Costs, including licenses and tools, Learner Financial Support point solution, training, interdependent projects, premises costs, first years sustainment, and other non-labour items.

FINANCIAL REPORT FY22/23 – EXECUTIVE SUMMARY

(in thousands)

	For the month of Jul-2022			Year-To-Date Jul-2022			Annual FY 2022/23			Overall Program ¹		
	Actual	Budget	Variance	Actual	Budget	Variance	Forecast	Budget	Variance	Forecast	Budget	Variance
UBC Resource Costs	3,839	4,479	640	14,861	17,152	2,291	50,469	52,556	2,087	149,894	149,894	-
External Prime Consultants	899	899	0	1,798	1,798	0	3,596	3,596	0	13,551	13,551	-
Other Costs	1,351	1,328	(23)	3,715	3,762	48	13,208	13,488	280	43,618	43,618	-
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Overall Program:

Not applicable, no variance forecasted

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Forecast based on info available as at August 9, 2022

The positive variances in UBC Resources are timing and are mainly due to slower hiring compared to the budget plan. The savings will be offset in the next FY's

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



CONCLUSION & NEXT STEPS

The Student Leadership Team is committed to working collaboratively to ensure alignment across all focus areas. There is a high density of work that is required over the coming months as part of Milestone 4. Resourcing and capacity continue to be monitored as the team works to a tight timeline.

IRP Student Update

Finance Committee

September 2022 – Open Session

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

Karamjeet Heer, Interim Vice-President Finance

Dr. Gage Averill, Provost and Vice-President Academic *pro tem*, UBC Vancouver

Dr. Rehan Sadiq, Provost and Vice-President Academic *pro tem*, UBC Okanagan

Dr. Kate Ross, Associate Vice-President Enrolment Services and Registrar

Dr. Joanne Fox, Principal and Academic Director, UBC Vantage College

Jennifer Burns, Chief Information Officer and AVP Information Technology

Dr. Ian Cavers, Lead Academic Sponsor

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



Agenda

Key Topics

1. Current Status
2. Program Milestone #3
3. Plan for Program Milestone #4
4. Key Risks and Issues
5. Cross Platform
6. Transition to Operations
7. TCM Update
8. Financial Summary

Current Status – Overall

Scope and Resources remain green, Schedule red (holding) pending plan adjustments to Milestone #4

IRP STUDENT PROGRAM STATUS

PREPARED BY IRP PMO, PERIOD ENDING WEDNESDAY AUGUST 24 2022



Current Status ✔ On track ⚠ At risk ✘ Off track ✔ ✔ Past / current week Status	Projected Trend Receiving attention ↑ Holding → Slippage imminent ↓	Risk Scoring Metrics ● Very High ● High ● Medium ● Low ▲ Operations Risks
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Key Accomplishments (This Week)		Upcoming Activities (Next Week)	
<ul style="list-style-type: none"> Milestone 4 plan alignment with Consolidated Plan is in progress M4 reporting mechanism has been established, awaiting final plan details First round of cross-checking of detail plans is complete, further work needed for M4 planning First Milestone 3 non-Pass item follow-up reporting has been initiated 		<ul style="list-style-type: none"> Completing M4 planning and detailed plan alignment. Completing the M4 milestone progression charts for Status Reporting Developing the Milestone 4 review process 	
Top Focus		Leadership Support or Action Required	
Schedule <ul style="list-style-type: none"> Schedule status remains Red M4 milestone planning in progress, applying M3 lessons learned Follow-up actions from monthly check-in 		<ul style="list-style-type: none"> Support for community engagement and feedback Endorsement for community support framework and funding 	
Resourcing <ul style="list-style-type: none"> Mitigation for increase in risks and issues related to resourcing needs in the past month (1 Risk – LFS 2 Risks – SCH, 2 Issues – SADR and 2 Issues – TC & ADM) 			

Top Risks and Issues

Inherent Risk Heat Map

Current Impact	Current Probability				Total
	1 - Unlikely	2 - Possible	3 - Likely	4 - Almost Certain	
4 - Critical		3		1	4
3 - High	1	9	7	5	22
2 - Medium		13	10	5	28
1 - Low		2	2		4
Total	1	27	19	11	58

Active Risk Count – Weekly Variance [-2]

Very High Risks and Issues

New Very High Score Risk:

- None

Response Plan Executed:

- None

New Very High Score Issue:

- None

Current Status – Recruitment

Wave 3 progressing as planned, turnover manageable, focus shifting to retention and transition planning

PROGRAM RECRUITMENT PROGRESS

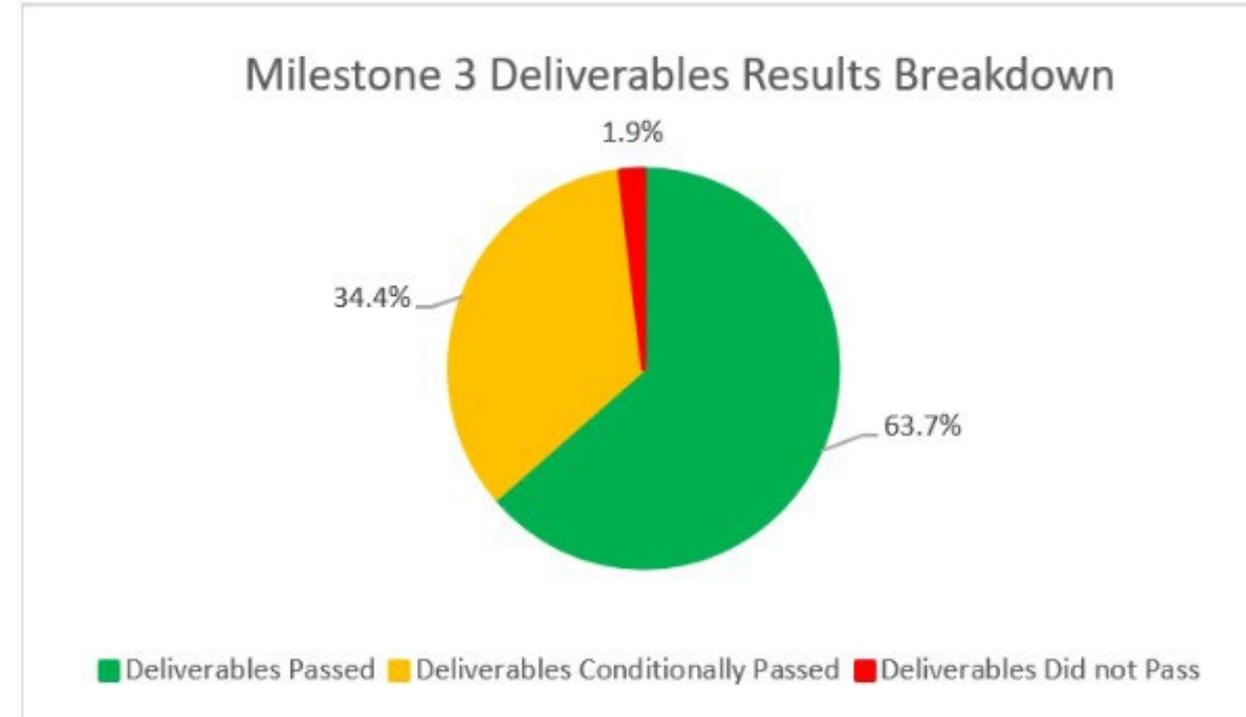
PERIOD ENDING WEDNESDAY AUGUST 24 2022

IRP Student Recruiting Dashboard Week ending:			Date: 8/24/2022				
Snapshot of IRP Student recruiting progress is highlighted below							
WAVE 3 PERIOD: 06/01/2022 - 11/30/2024							
Wave 3 - Internal Hiring into Positions			Wave 3 - External Hiring into Positions				
	N/A	% Position Posted		57%	% Position Posted		
	GREEN	Overall Status		GREEN	Overall Status		
	N/A	Offers Completed		40%	Offers Completed		
Percent Complete (per position) by key stage gate of recruiting							
Wave 3 - Internal Hiring into Positions				Wave 3 - External Hiring into Positions			
	Actual	Planned	Percentage		Actual	Planned	Percentage
Approved for Hiring inside IRP	6	6	N/A	Approved for Hiring inside IRP	98	105	93%
Job Descriptions Completed	6	6	N/A	Job Descriptions Completed	64	105	61%
Position Approved by Compensation	6	6	N/A	Position Approved by Compensation and HR	62	105	59%
Position Approved by HR and in WD	6	6	N/A	Jobs posted in WD	60	105	57%
Offers Made	4	6	N/A	Offers Made	43	105	41%
Offers Accepted	4	6	N/A	Offers Accepted	42	105	40%
Recruitment Update				HR Action Plan and Outlook			
<ul style="list-style-type: none"> August 17 2022 to August 24 2022 = Received 140 since last week for all positions posted Expected offers this week (2): Senior Change Management Specialist- CEP, TCM <ul style="list-style-type: none"> QA Analyst (Co-op), QA – not reflected in stats above because 2 Co-op students share 1-line item. Offers made: 41% 1 resignations: Test Automation Engineer, QA (Co-op) – Personal reason: co-op student ended co-op term earlier than anticipated. 0 offers declined. <p>Workstream Updates:</p> <ul style="list-style-type: none"> QA: interviewing for QA Analyst II – potentially co-op students. Recruitment efforts continued. ECO: Senior BA – recruitment in progress. TECH: Recruitment underway for outstanding positions: Senior Developer and Developer II. PM II, Special Reporting-hired. On track. TCM: Senior Change Management Specialist- CEP – references underway. Learning Rover Co-op JD about to be posted. STU: PM II, STU – final interview underway. SADR: BA II, Data & Reporting (1)- recruitment underway. Additional BA II, Enterprise Data Governance recruitment underway. Senior BA & BA II (incremental roles)- posted. Senior Manager, Security and Access-prescreens underway. PMO: Benefits Realization Strategist - hired. PM I- prescreens underway. 				<ul style="list-style-type: none"> Continue expediting reference checks and offer letters Reminders sent for upcoming performance reviews and associated probationary/MPI increases. Merit increases approved, please send the completed performance reviews to HR. HR weekly status reporting is under review 			

Program Milestone #3 – Final Results

Goal of 80%+ achieved, with clear line of sight to effort required in Program Milestone #4

- Overall count: 259 deliverables
- Overall Pass/Conditional Pass: 98.1%
- Breakdown:
 - Pass – 63.7%
 - Conditional Pass – 34.4%
 - Did not Pass – 1.9%
- If not Pass, ability for work to progress confirmed and completion date acceptable
- Lessons learned include:
 - Increase efficiency of artifact reviews
 - Improve automation for updates
 - Introduce “mini gates” throughout vs a lengthy gate toward the end of the milestone



Program Milestone #3 – Consolidated Plan Update

Current release is now Emerald (V5)



Plan for Program Milestone #4

Successful completion of Program Milestone #4 is critical to remaining on the current timeline

- Program Milestone #4 contains a very significant number of deliverables to be completed
- Program Senior Leadership Team (SLT) has developed a strategic approach to mitigate risk
- SLT has collaboratively prioritized work in Milestone #4, primarily through re-sequencing, informed by:
 - Capabilities and business processes required for Launch 1 Go/No-Go decision
 - Timing of business uptake
 - Level of effort/complexity
 - Overall risk and mitigations for a given capability if delays occur (including # of users impacted)
- Security role validations and all data conversions (except Historical) prioritized for completion in time for E2E tenant build (Feb 2023)
- Improved, more automated Milestone Tracker and monthly check ins
- Plan to incorporate shorter, more frequent technical/functional reviews or “mini-gates”, similar to sprint conducted in July for Program Milestone #3

Key Risks and Issues

While good progress is being made, key risks and issues are being closely monitored

Issues	Risks	Very High
● Issue 8 – LFS - Design Work Behind Schedule	● Risk 20 - Point Solutions Data Conversion scope is unknown	High
● Issue 6 – Business Objects Exposure in Workday for Reports Query	● Risk 77 – Training materials development delayed by revised E2E testing timeline	Medium
● Issue 20 - Programs of Study (CNV078) Data Quality Issues	● Risk 56 – Resource Shortage and Staff Retention within Academic System (SIS Operations)	Low
● Issue 17 - ADM - Delays to Transcript Integration Design	● Risk 57 – JBoss Support and lack of resources to upgrade to current version (SIS Operations)	
● Issue 28 – BDV User Stories Review & Data Sets Delivery Delay	● Risk 59 – Change in Licensing cost for Atlassian products (confluence, Jira, bamboo, bitbucket) (SIS Operations)	
● Issue 30 – Transfer Credits Resourcing Constraint		
● Issue 19 – Workday configuration does not reflect complex academic structure		
● Issue 29 – Data Quality & Cleanup Activities Delay		
● Issue 16 - ADM - Delays to requirements due to business availability		
● Issue 27 – Data Quality & Cleanup Activities Delay		
● Issue 31 – ADM - Delays to matriculation design due to transfer credit dependencies		

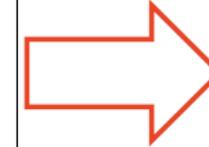
NOTE: Greyed out text indicates SIS operational risk i.e. dependency vs direct Program risk

Cross Platform

Cross platform oversight and decision-making in place and progressing well

Business Oversight

- Input, visibility, and status updates
- Identify resources and business owners/decision makers
- Resolve issues, competing priorities
- Ensure work (outside of IRP Student) resourced and prioritized
- Ensure support from both the business and ISC for planned changes
- Support for change management planning

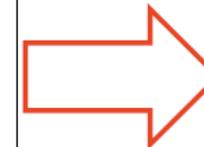


POCS

- Regular status updates
- Business oversight
- Escalations, etc.
- Additional meetings booked for deeper dives
- Visibility and endorsement of changes

Technical/Platform Oversight

- Enterprise level view
- Adherence to enterprise standards
- Review of downstream impacts
- Ensure change management (of platform, integrated systems) planned for outside of STU (in collaboration with IRP TCM)
- Coordinating go-live decisions
- Pre-approvals prior to Move to Production planning and ahead of ISC CAB

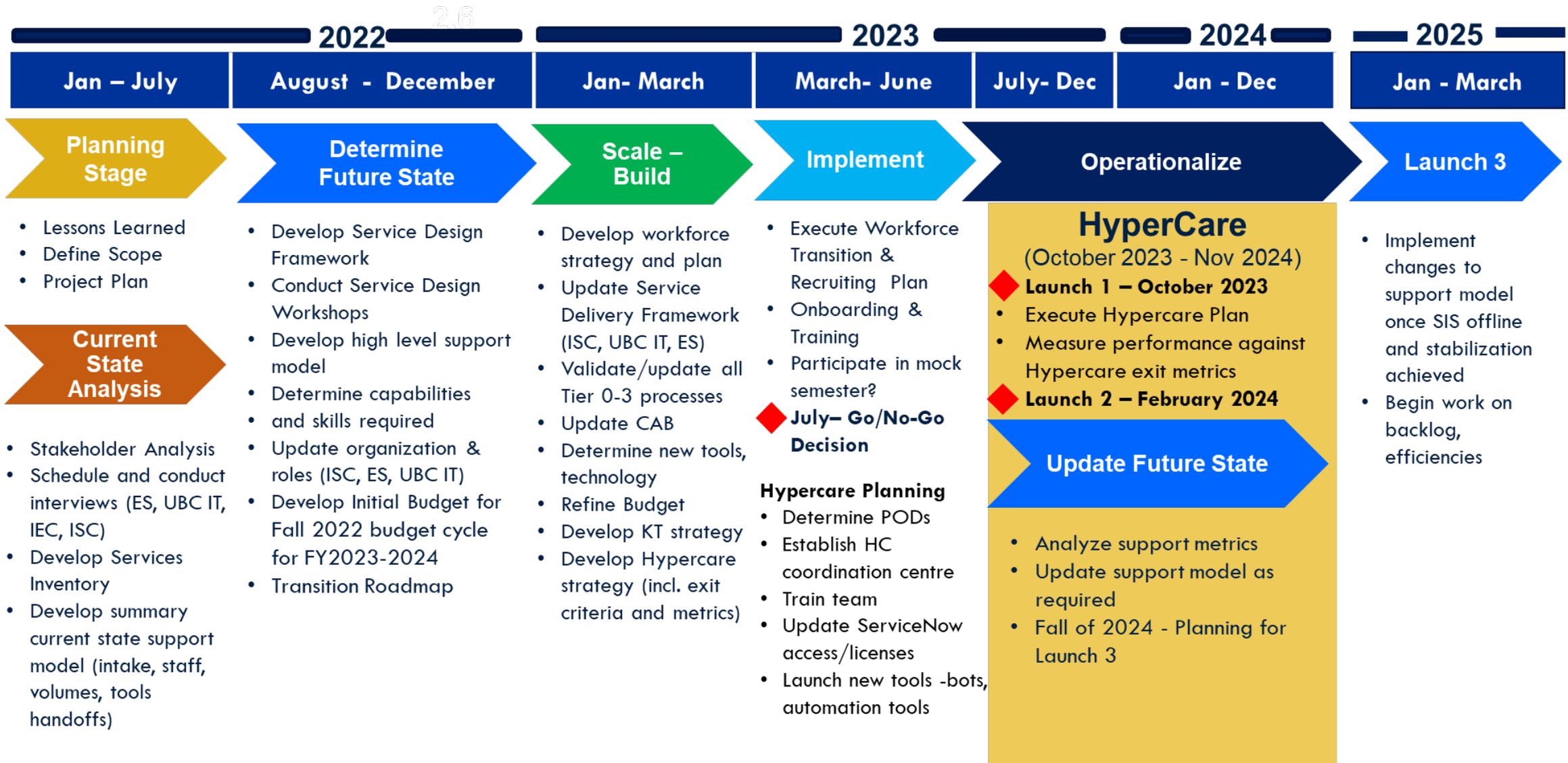


Change Review Board

- Enterprise platform oversight
- Collaborative decision-making
- Structured way to review and approve cross-platform changes

Transition to Operations

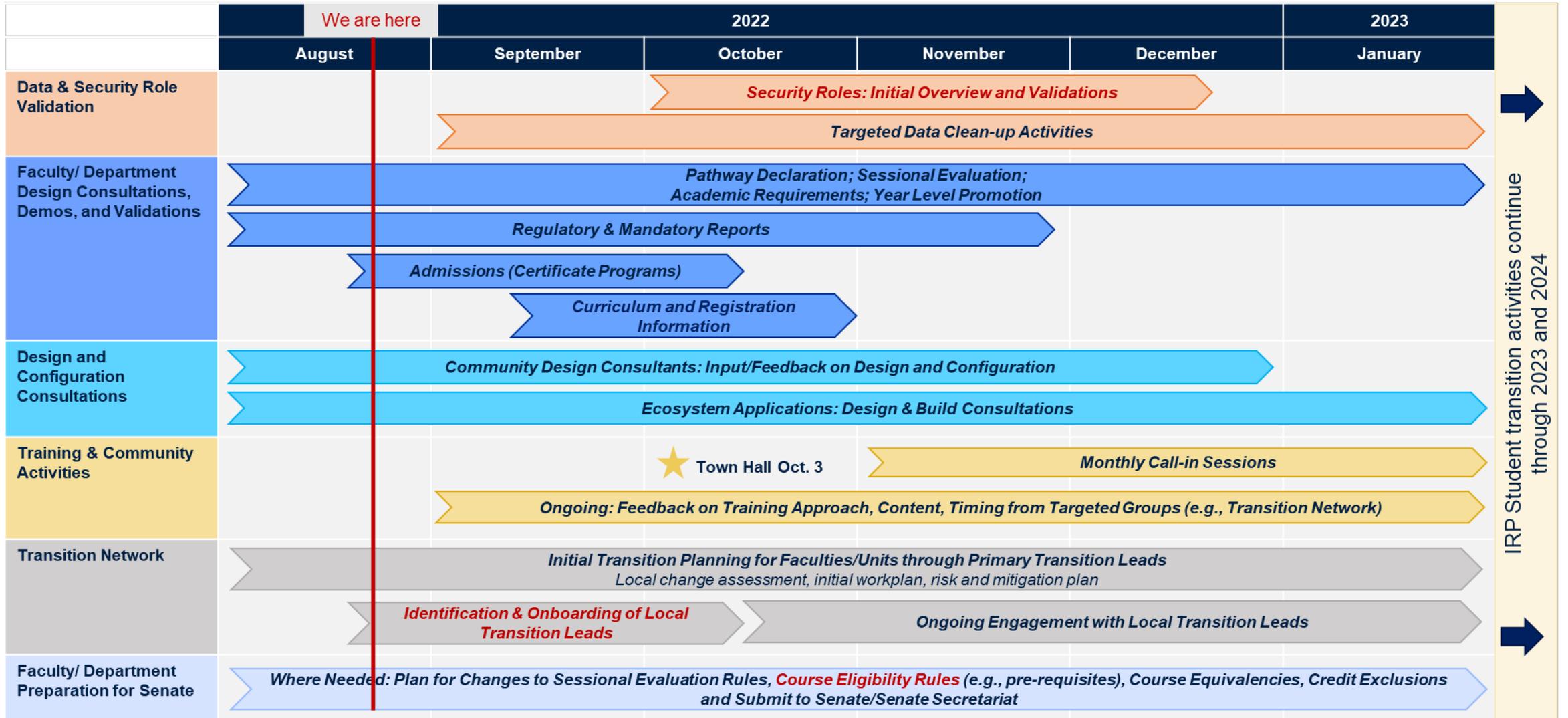
Planning underway, cross-functional team kickoff Aug 3, service design workshops in progress



TCM Update

Transition Network active with check-ins, meetings, demos/workshops, emails, and Canvas

Current as of August 19, 2022. Subject to change



Financial Summary

	For the month of Jul-2022			Year-To-Date Jul-2022			Annual FY 2022/23			Overall Program ¹		
	Actual	Budget	Variance	Actual	Budget	Variance	Forecast	Budget	Variance	Forecast	Budget	Variance
<i>(in thousands)</i>												
UBC Resource Costs	3,839	4,479	640	14,861	17,152	2,291	50,469	52,556	2,087	149,894	149,894	-
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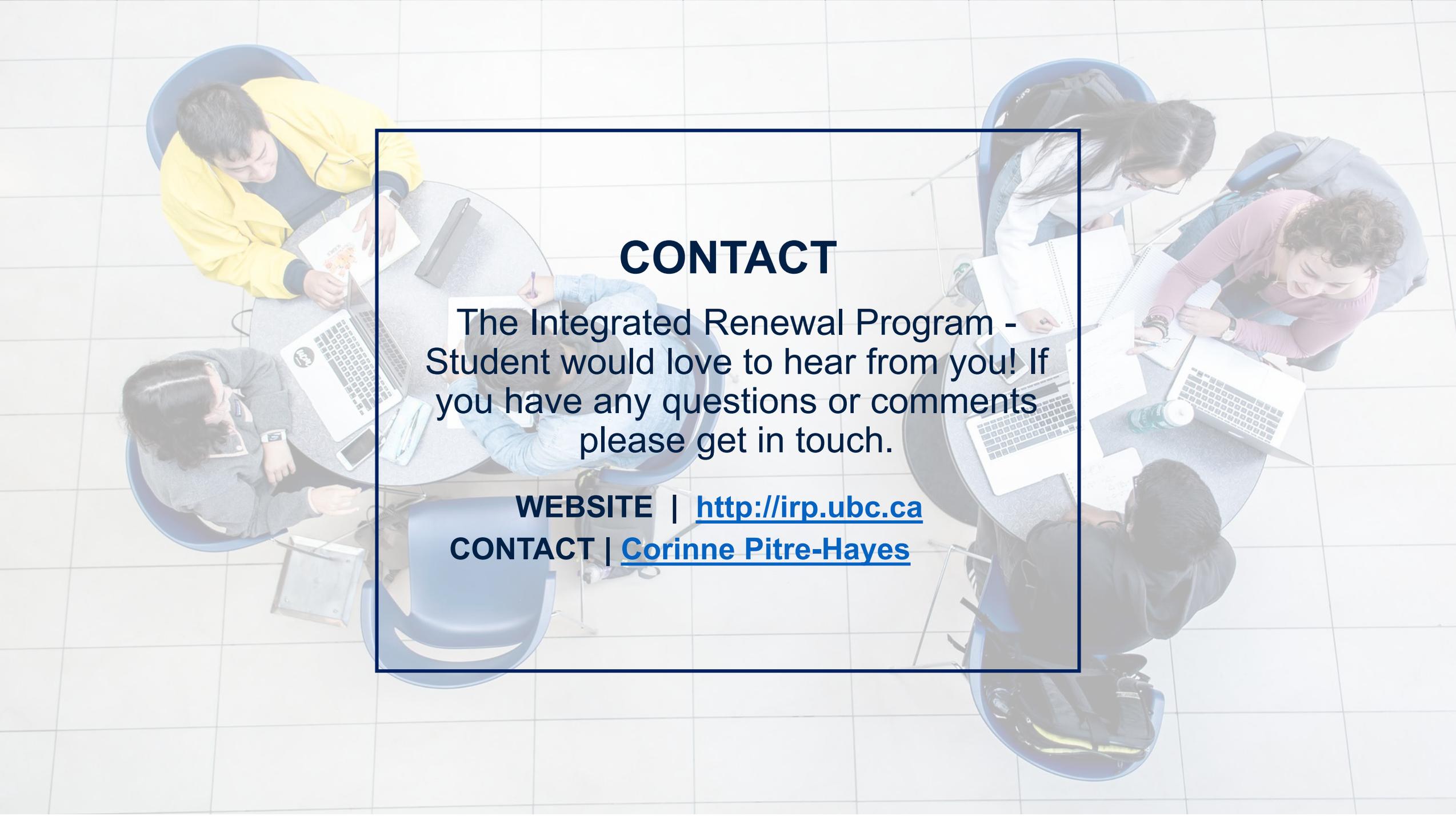
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CONTACT

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](#)