



SUBJECT	Integrated Renewal Program (IRP) Student – Update and Funding Request
SUBMITTED TO	Finance Committee
MEETING DATE	March 22, 2023
SESSION CLASSIFICATION	Recommended session criteria from Board Meetings Policy: OPEN
REQUEST	<p>APPROVAL REQUESTED</p> <p>IT IS HEREBY RESOLVED that the Finance Committee recommends to the Board of Governors approval of a funding release of \$99.2 million (including contingency) in fiscal year 2023-2024 within a total program envelope of \$284.9 million (including contingency), in accordance with Board 3 approval received in June 2021.</p>
LEAD EXECUTIVE	Lesley Cormack, Deputy Vice-Chancellor and Principal, UBC Okanagan
SUPPORTED BY	<p>Gage Averill, Provost and Vice-President Academic</p> <p>Rehan Sadiq, Provost and Vice-President Academic, UBC Okanagan</p> <p>Elana Mignosa, Associate Vice-President Finance & Operational Excellence</p> <p>Jennifer Burns, Chief Information Officer and AVP Information Technology</p> <p>Joanne Fox, Principal, UBC Vantage College</p> <p>Rella Ng, Associate Vice-President Enrolment Services and Registrar</p> <p>Ian Cavers, Lead Academic Sponsor</p> <p>Shelly Morrison, Senior Director, Financial Services & Strategic Procurement</p> <p>Jennifer Kain, Chief Audit & Risk Officer</p> <p>Janice Stewart, Associate Dean, Innovation and Strategy, Faculty of Arts</p> <p>Patricia Lasserre, Associate Professor, Computer Science, Faculty of Science, UBC Okanagan</p> <p>Cam Gray, Executive Director, HR Operational Excellence</p> <p>Carri Lawrence, Director, Financial Operations, UBC Okanagan</p> <p>Corinne Pitre-Hayes, Program Director, Integrated Renewal Program</p> <p>Laura Wecker, Manager, Program Administration & Internal Communications</p>

PRIOR SUBMISSIONS

The subject matter of this submission was most recently considered by the Finance Committee on [November 17, 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 has accomplished a great deal. Both Scope and Resources remain green on the Status Report. Schedule remains red as the team navigates Milestone 4 deliverables. Due to the large number of Milestone 4 deliverables the work was grouped into 3 categories: Milestone 4.0, Milestone 4.1, and Milestone 4.2. As of February 1st, 84% of the items listed as Conditional Pass or Did Not Pass in the Milestone 4.0 review have been completed. The team is currently coming to the end of Milestone 4.1 with the final review scheduled for March 9, 2023. Milestone 4.2 begins immediately with an end date of March 31, 2023.

The Transformation & Change Management team have launched their series of Call In Sessions for the community.

These Call In Sessions are targeted community engagements that follow the Workday 101 virtual sessions and provide a deeper dive into the functionality of Workday Student. Two sessions have taken place so far, both were well attended and engagement was high, with representation from both the Vancouver and Okanagan campuses. Sessions will be ongoing through 2023 and topics will be shared with appropriate audiences as they are scheduled.

As mentioned in a previous committee meeting, IRP Student established a Community Support Funding Framework to ensure institutional readiness. The objective of the framework is to ensure there are adequate resources within faculties and units to support training, transformation and adoption activities. Requests from the Faculty of Science and Enrolment Services have been approved, and the TCM team expects to be busy with additional requests as we approach the upcoming launches.

End-to-End Testing is critical for the successful launch of Workday Student in 2023/2024. It is one of the program's top priorities and teams across all focus areas are working together to ensure structures are in place and timelines are protected. To align with the sequencing of the launch plan, E2E testing will be an iterative process. The primary objective for Round 1 E2E testing is to ensure sufficient empirical data is provided to support the Go Decision for each functional area and across both Launch 1 and Launch 2.

The Go Decision will take place once Round 1 of End-to-End testing has completed. At this time leadership will review the approved evaluation criteria and will make the decision to move forward with implementation. The Go Decision criteria is currently being developed and going through IRP governance for review and approval. The Go Decision is scheduled for mid-July 2023 and will adopt an extensive review process within IRP Student, and through UBC leadership.

A key piece of the Go-Decision is the Transition to Operations approach and plan. . Support for the Workday ecosystem will involve multiple groups across both campuses, including the Integrated Service Centre, UBC IT, Enrolment Services, and groups within the Faculties. Therefore, it is critical that support organizations are prepared to support the community at implementation to ensure the overall success of the implementation. . We are making progress in this area, and the Service Delivery Model (SDM) has been agreed upon and a Sustainment Model Roadmap has been drafted for review and approval.

A financial summary of IRP Student for year to date as of December 2022 is included. The savings listed are due mostly to timing variance, and will be offset in the next fiscal year.

APPENDICES

1. IRP Student Status Report

PRESENTATIONS

1. IRP Student Update



STATUS REPORT:

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 PROGRAM STATUS

PREPARED BY IRP PMO, PERIOD ENDING WEDNESDAY FEBRUARY 15, 2023

Program Health

Scope: → Resources: ↓ Schedule: →

Current Status

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

Projected Trend

- Improving ↑
- Holding →
- Declining ↓

Risk Scoring Metrics

- Very High
- High
- Medium
- Low

Key Accomplishments (Last Week)	Upcoming Activities (Next Week)
<ul style="list-style-type: none"> As of Feb 1st, 84% of the M4.0 Conditional Pass and Did Not Pass items have been completed Transition to Operations: Agreement reached on high level support model Tier 1 IRP Student Key Dates visual has been shared on the internal IRP team Share Point site Go decision criteria first rounds completed with all teams Milestone 4.1 second check-in occurred on Feb 10th with SLT Program Risk Review meeting occurred on Feb 13th with SLT Institutional readiness results and recommended actions were shared with Steering committee 	<ul style="list-style-type: none"> Progressing on Milestone 4.1 completion Transition to Operations: High-level Workday Sustainment workshop for sponsors – agreement on Tier 2 division of work Continued progress on Go decision criteria and draft dashboard Preliminary development of briefing notes on key issues for Sponsors and Stakeholders in progress

Top Risks and Issues

Issue Heat Map

IMPACT	URGENCY				Total
	1 - Low	2 - Medium	3 - High	4 - Critical	
4 - Critical	0	0	1	1	2
3 - High	0	1	9	0	10
2 - Medium	0	6	0	0	6
1 - Low	0	1	0	0	1
Total	0	7	10	1	18

New Issues +1 **Closed Issues - 0**

- New Very High Score Issue:

Top Focus	Leadership Support or Action Required
<p>Schedule</p> <ul style="list-style-type: none"> Schedule status is Red and is holding based on results of Milestone 4.1 second check-in Milestone 4.1 final review meeting scheduled for March 9th Continuous plan refinements in support of Milestone 4 overall success 	<ul style="list-style-type: none"> Continued off-cycle support for expedited consultation and/or decisions

Inherent Risk Heat Map

Current Impact	Current Probability				Total
	1 - Unlikely	2 - Possible	3 - Likely	4 - Almost Certain	
4 - Critical	0	3	0	3	6
3 - High	2	9	11	9	25
2 - Medium	0	15	10	5	30
1 - Low	2	2	2	0	6
Total	4	29	23	11	67

New Risks +1 | **Response Plans Executed - 0** | **Risk Realized - 0**

- New Very High Score Risk:

At this time no changes in Scope have been identified. Milestone 4.0 has completed, and as Milestone 4.1 wraps up and 4.2 begins the Senior Leadership Team (SLT) will continue to resequence work when possible to ensure the timeline is met. The timeline remains a challenge, however the teams are actively engaged in the plan and are working collaboratively to identify and solve any gaps or bottlenecks.

Schedule remains at risk, but has shifted from a downward trajectory to a steady trajectory based on the categorization of Milestone 4 into 3 separate phases (all completing at the end of March 2023).

Schedule is a top focus for the team and continuous plan refinements are occurring to stay on track.

Resources remain green, with a downward trend. The hire completion rate for the program is at 88% with approximately 7% of the team being contractors. Wave 3 hiring is progressing and includes a large number of student Learning Rovers planned for mid-2023.

The Program Human Resources Progress Dashboard reports weekly on hiring rates, attrition, and open roles. Attrition rates are monitored and HR is in the process of a deep dive to analyze trends and verify retention strategies. Leadership continues to monitor individual and overall team health, as there are concerns around burnout and term-end dates.



PROGRAM HUMAN RESOURCES PROGRESS REPORT
PERIOD ENDING WEDNESDAY OCTOBER 19, 2022

DRAFT

HR Reporting

HIRING G

Overview:

- Planned Positions: **October – 403**
- Actual Count- **377**
- Contractors-**5**
- Contractor portion of total count- **1.3%**
- Hire Completion Rate: **93%**
- October Attrition rate: **0.53%**

Current Open Roles: 22

Open Roles

- There are currently 22 open roles in the IRP Program
- The highest distribution of open roles currently falls within TECH

Contractor Update

- Current Count: 5
- Approved new to hire: 8
- Former Count: 22

Hiring Progress

Hiring Progress

- There have been 103 applications received in the last week for positions posted

Recruitment Constraints

- Available resources in the current market
- Compensation limitations
- Work term end dates

RETENTION A

Monthly Attrition Rate %

Retention Strategies:

- Completion of Yearly Performance and Merit Reviews within anniversary dates
- Monitor attrition rate movement
- Encourage Supervisors to connect with team members
- Create opportunities for development
- Refine internal process for lateral transitions

Team Health

A. Concerns are surfacing around term-end dates

Performance Reviews completed: 74%

Risks

- Shortage of market resources
- Retaining staff within Academic Systems

Integrated Renewal Program - Student

G Managing Well

A Potential Issue - Monitoring Closely

R Issue and Need to Escalate

1

MILESTONE 4.1

Milestone 4.1 is well underway and follows the same structure as Milestone 4.0. M4.1 is comprised of approximately 444 deliverables, some of which were shifted over from 4.0. As part of the approach there are check-ins scheduled throughout the milestone. The second check-in occurred on February 10th with the final review scheduled for March 9, 2023. Milestone 4.2 begins immediately after with a completion date set for March 31, 2023 and contains approximately 140 deliverables.

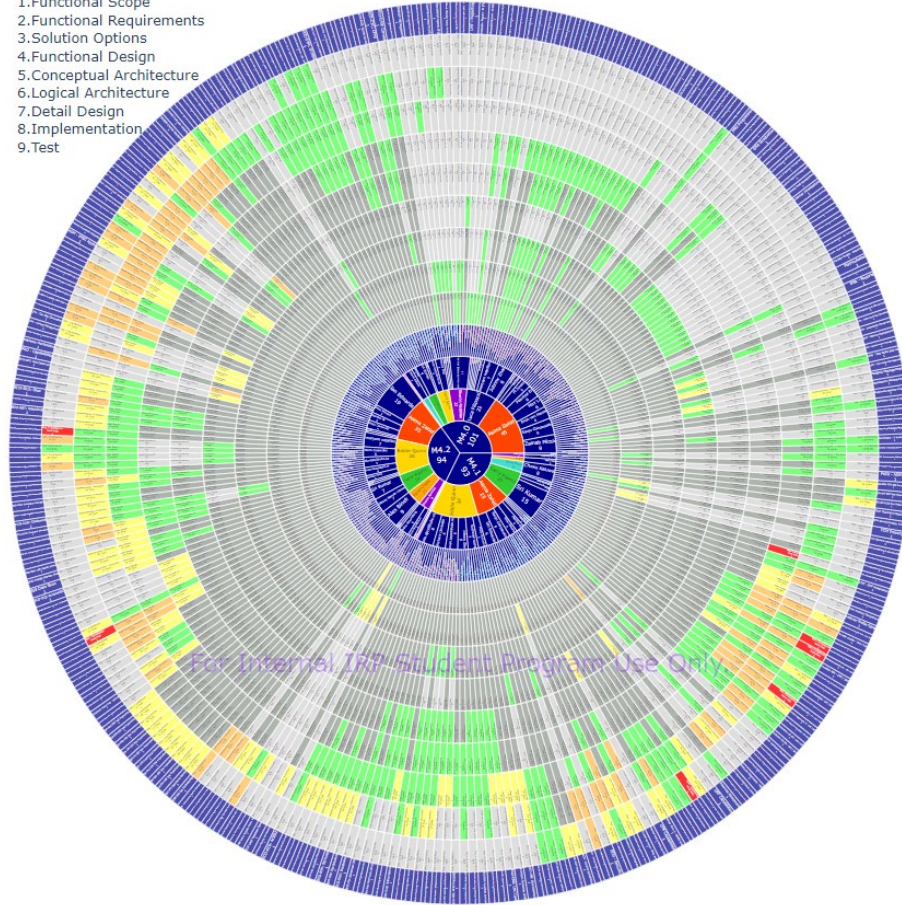
IRP Student continues to leverage the Sunburst Chart that was developed in Milestone 3 and improved upon for M4. This tracker provides a visual representation of each deliverable by owner, by focus area, and by item. As work progresses the items in the tracker status and colours shift to indicated completeness. This demonstrates progress, and highlights areas that are requiring additional support.

The focus for Milestone 4.1 and 4.2 are deliverables that are critical for the Go Decision in July and completing preparation for End-to-End testing readiness.



IRP STU M4.0+4.1+4.2 Critical Deliverables Status Summary on 2023-02-20

- 1.Functional Scope
- 2.Functional Requirements
- 3.Solution Options
- 4.Functional Design
- 5.Conceptual Architecture
- 6.Logical Architecture
- 7.Detail Design
- 8.Implementation
- 9.Test



COMMUNITY CALL IN SESSIONS:

The Transformation and Change Management team is working with stakeholders across the community to ensure engagement and help prepare for the transition to Workday Student. As part of their outreach community Call in Sessions have been begun and are scheduled throughout the coming months. The Community Call in Sessions provide a deeper dive into the functionality of the new information system, detailing changes. Each session is focused on a particular focus area and a list of recommended attendees. Two sessions have taken place so far in 2023, the Program of Study Overview and Admissions and Matriculation. Both sessions were well attended with representation from both the Vancouver and Okanagan campuses, with participants engaged and asking questions.

Upcoming Call In Sessions are as follows:

- **Course Inheritance & Making Course Section Updates** – March 2, 2023: 12:30 – 1:30PM
- **Maintain & Create Course Clusters** – March 14, 2023: 10:00 – 11:00AM
- **Student Journey Through Registration** – May 2, 2023: 10:00 – 11:00AM
- **Graduate Education Session** – May 30, 2023: 10:00 – 11:30AM

Additional Call in Sessions will be scheduled throughout the spring and summer.



COMMUNITY SUPPORT:

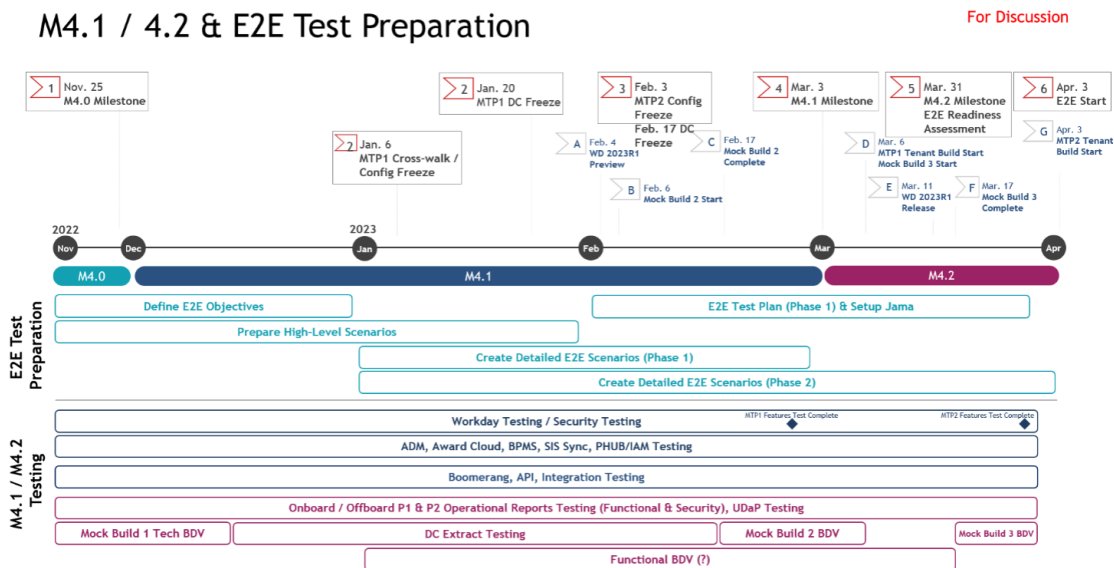
To support the community and ensure institutional readiness a Community Support Funding Framework was established. The objective of the framework is to ensure there are adequate resources within faculties and units to support training, transformation and adoption activities. Many faculties are already operating at capacity, and adding IRP Student transition support responsibilities to existing resources potentially impacts the day to day operations of the faculty/unit and adds risk for burnout due to already heavy workloads. Some faculties have the structure and resources to accommodate the hiring of additional support to lead IRP Student transition work, while some cannot accommodate these unplanned costs. IRP Student anticipated a need for additional human resources support as the community transitioned to Workday Student, this was also supported in the independent review completed for Board 3 approval.

Support Funding requests are being received, with funding already approved for both the Faculty of Science and Enrolment Services. We anticipate that the Transformation and Change Management team will be busy providing support for Community Support requests in the coming months. Having this support available demonstrates partnership for the work required across UBC to prepare and adopt Workday Student. It also highlights the importance of Workday Student for the ongoing success of the university.

END-TO-END TESTING

End-to-End Testing is critical for the successful launch of Workday Student in 2023/2024. It is one of the program’s top priorities and teams across all focus areas are working together to ensure structures are in place and timelines are protected. End-to-End (E2E) testing preparation is occurring in parallel with Milestones 4.1 and 4.2, which has all teams working at capacity to meet deadlines.

See the M41. / 4.2 & E2E Test Preparation Timeline below:



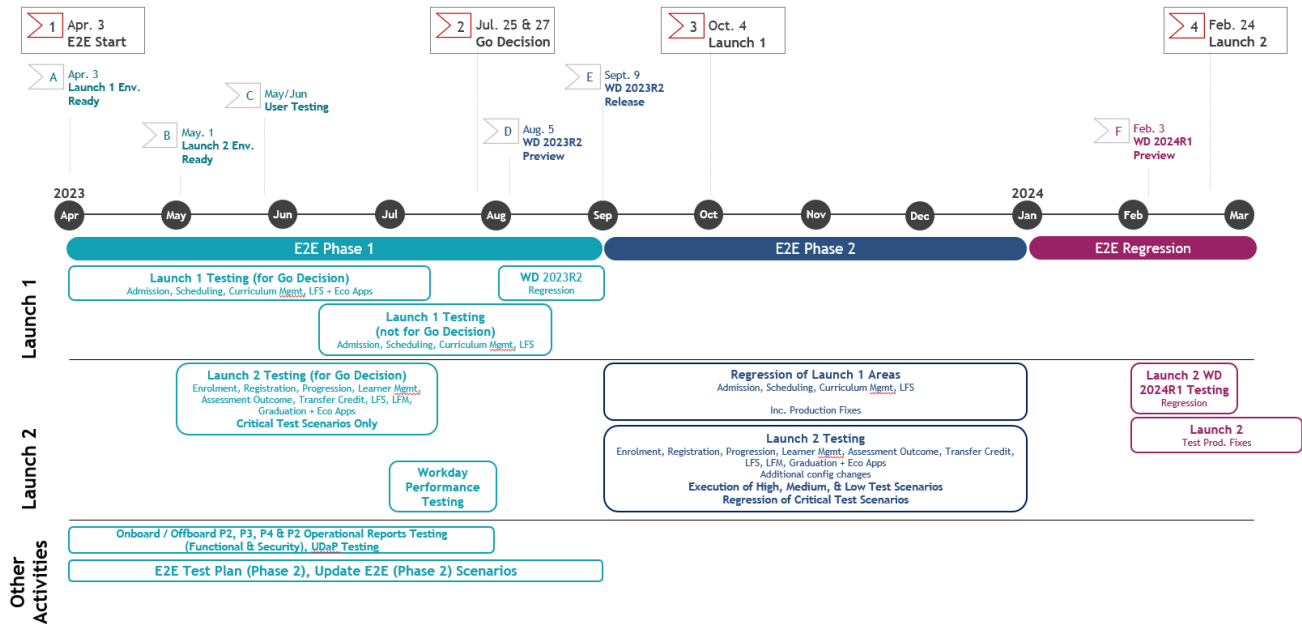


The Quality Assurance and Testing team is responsible for the overall program’s testing strategy, defining test methodologies, standards, guidelines and End-to-End (E2E) testing entrance and exit criteria. They coordinate test preparation and allocate QA resources to each focus area based on need, and there are dedicated QA Leads assigned to both the Workday Solution and each Point Solution. Once testing is underway the team is responsible for tracking testing status and providing assessment based on the testing metrics. QA is responsible for defect management, including triage and prioritization and to ensure test coverage via a traceability matrix (Requirements > Test Cases > Defects). Testing results are crucial to the overall readiness assessment and play a significant role in the Go Decision.

The Testing Approach for End-to-End (E2E) testing is based on producing empirical evidence for the Go Decision. The Go Decision Functional Content is one of the key driving factors for defining the E2E Testing sequence. Capabilities in each functional area are categorized into items required for the Go Decision including: Launch 1 – E2E Testing must be completed and Launch 2 – E2E Testing for critical priority scenarios must be completed (remaining E2E Testing will continue until the end of 2023). E2E Testing will be underway and will not be fully completed prior to the Go Decision, but must be fully tested in advance of the appropriate Launch; Launch 1 (by Aug 2023), and Launch 2 (by Jan 2024).

End-to-End Test Execution Timeline

For Discussion



As milestone deliverables are resequenced and/or reprioritized throughout the program, so too is the testing strategy. To align with the sequencing of the launch plan, E2E testing will be an iterative process. The primary objective for Round 1 E2E testing is to ensure sufficient empirical data is provided to support the Go Decision for each functional area and across both Launch 1 and Launch 2.



GO DECISION:

The Go Decision will take place once Round 1 of End to End testing has completed. At this time leadership will review the approved evaluation criteria and will make the decision to move forward with implementation. The proposed governance approach for the Go Decision criteria was reviewed and approved by Executive Sponsors.

Functional Items for consideration as part of the Go Decision include everything in Launch 1 with some exceptions, critical business and/or cross functional capabilities, capabilities required at specific times in the academic cycle, business processes, and impacted users.

In addition to functional items the following items must be considered and/or in place to move forward with the Go Decision: Community & Institutional Readiness, critical Cross Platform capabilities, an approved Transition to Operations Plan, and the ability to maintain business continuity across the university.

A number of tools will be used to monitor the criteria and support the Go Decision information. The criteria will be captured per focus areas, at the detailed level, which will be rolled up into a dashboard, providing a holistic representation of the state of readiness. For any items that do not meet the criteria there will be an action tracker. This will highlight items of concern, and will include a risk assessment and associated actions in place to resolve the issue(s) before launch.

The Go Decision is scheduled for mid-July 2023 and will go through a series of reviews. It begins with the program's Student Leadership Team and then both the Steering Committee and Executive Sponsors. Next, the criteria will be reviewed by the Information Technology Advisory Council (ITAC) and the Interim President and Vice-Chancellor of UBC, with a final review scheduled with the UBC Executive. The July timing allows UBC to pivot, and move forward with the current SIS if necessary, should the decision be made to delay Launch 1.

TRANSITION TO OPERATIONS:

As mentioned a critical piece of the Go Decision is the Transition to Operations, and confirming that the organization is adequately prepared to support Workday Student going live. This includes confirming that the Integrated Service Centre (ISC) is staffed and trained to manage the significant uptick in support requests once Student is live. It is critical that both the support organization and the business area/faculties feel prepared to transition from the SIS to Workday Student. This transition includes the initial stabilization phase (Hypercare) through to day-to-day operations (Sustainment).



Service Delivery Model:

An agreement has been reached on the recommended end-user service delivery model (SDM), which will go through IRP governance for approval. The support structure proposed is as follows:

- **Support for Students – mirror ‘As Is’ model for SIS**
 - Enrolment Services to be promoted as the single point of contact for any student issues, including Workday support, (in collaboration with local Faculty Advisors, Central Administration Units).
- **Support for Staff/Faculty – mirror existing Workday platform support**
 - The Integrated Service Centre (ISC) to be promoted as the single point of contact for Workday application support for staff and faculty, in alignment with the existing ISC support model. The ISC will work in close collaboration with Enrolment Services.

Sustainment Model Roadmap:

The initial draft of the roadmap to sustainment has been drafted and is set for review and approval. This draft includes the breakdown of high-level work that is necessary to sustain Workday Student post go-lives (Launch 1: October 2023, and Launch 2: February 2024), and finalizing where this work will be performed in order to resource plan. For the transition to sustainment to be successful the roadmap incorporates the product launches, including Hypercare, and the time needed for knowledge transfer. In comparison to Workday Finance and HR, Workday Student is a young product with many enhancements expected over the next 3-5 years, including several blocker/gaps with expected delivery beyond Launch 1 and 2. Due to the maturity of Workday Student, a phased handoff of the Academic Foundation Data component (adding/changing programs of study, eligibility rules, etc.) was recommended to ensure business continuity and adequate time for stabilization.

Once the SDM has been approved, resource plans and budgets can be finalized and work concerning the workforce transition strategy/plan to address employee transition and retention within the IRP Student program team, the ISC, existing Enrolment Services and UBC IT departments can continue.

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.

The overall IRP recast budget was approved by Executive Sponsors and the Finance Committee of the Board in 2022. The forecast below is based on the information available as of January 5, 2023.



For Year to Date, as of December 2022 Savings are \$5,508K. This is mostly due to a timing variance in UBC Resources, \$4,345K. The positive variances in UBC Resources are timing and are mainly due to slower hiring compared to the budget. The savings will be offset in the next fiscal year. The additional \$1,163K are related to Other Costs, including \$1,105K savings due to the move out of FERIC.

(in thousands)

	For the month of Dec-2022			Year-To-Date Dec-2022			Annual FY 2022/23			Overall Program ¹		
	Actual	Budget	Variance	Actual	Budget	Variance	Forecast	Budget	Variance	Forecast	Budget	Variance
UBC Resource Costs	4,346	4,509	163	35,355	39,699	4,345	50,156	52,517	2,361	149,757	149,757	-
External Prime Consultants	-	-	-	2,697	2,697	0	3,596	3,596	0	13,551	13,551	-
Other Costs	309	1,341	1,032	6,662	7,825	1,163	12,326	13,488	1,162	53,618	43,618	(10,000)
Total expenses before contingency	4,655	5,850	1,195	44,713	50,221	5,508	66,078	69,601	3,522	216,926	206,926	(10,000)
Contingency - approved allocation	-	-	-	-	-	-	-	(826)	(826)	-	10,000	10,000
Contingency Remaining	-	-	-	-	27,062	27,062	-	27,062	27,062	-	68,000	68,000
Total after Contingency	4,655	5,850	1,195	44,713	77,283	32,569	66,078	95,836	29,758	216,926	284,926	68,000

Variance analysis:	For the month of December 2022: Savings are \$1,195k due to: \$163k UBC Resources - \$163k timing - delayed hiring \$0k Prime Consultants \$1,032k Other Costs - \$1,082k savings - FERIC lease; licenses	For Year to Date, December 2022: Savings are \$5,508k due to: \$4,345k UBC Resources - \$4,345k timing - delayed hiring \$0k Prime Consultants \$1,163k Other Costs - \$1,105k savings - FERIC lease; licenses - \$58k timing - various	Annual Forecast for FY22/23: Savings are \$3,522k due to: \$2,361k UBC Resources - \$2,361k timing - delayed hiring \$0k Prime Consultants \$1,162k Other Costs - \$1,187k savings - FERIC lease; licenses	Overall Program: \$10,000k Other Costs - \$10,000k - Community support (PCR103)
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¹ The overall IRP Student program RECAST budget was approved by the Executive Sponsors on May 11, 2022. It was presented to the BOG's Finance Committee in June 2022. Forecast based on info available as at January 5, 2023. 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

NEXT STEPS

The entire IRP Student team continues to show commitment and dedication to the program. The teams show up for one another, ask smart questions and strive to do the right thing for UBC. The ramp up for E2E test preparation is underway in anticipation of Milestone 5. As workload and pace remain high leadership continues to monitor for potential staff stress and burnout and are continually developing retention strategies to mitigate concerns around term dates ending. The Transformation & Change Team is working alongside the community to create engagement and prepare for Workday Student.

IRP Student Update

Finance Committee

March 2023

Dr. Lesley Cormack, Deputy Vice-Chancellor and Principal, UBC Okanagan
Dr. Gage Averill, Provost and Vice-President Academic, UBC Vancouver
Dr. Rehan Sadiq, Provost and Vice-President Academic, UBC Okanagan
Elana Mignosa, Associate Vice-President Finance & Operational Excellence
Jennifer Burns, Chief Information Officer and AVP Information Technology
Dr. Joanne Fox, Principal, UBC Vantage College
Dr. Ian Cavers, Lead Academic Sponsor
Corinne Pitre-Hayes, Program Director, Integrated Renewal Program Student



Agenda

Key Topics

- Status Report
- Milestone 4.1
- Community Support
- End-to-End Testing
- Go Decision
- Transition to Operations
- Financial Report
- Resolution

IRP STUDENT PROGRAM STATUS

PREPARED BY IRP PMO, PERIOD ENDING WEDNESDAY FEBRUARY 15, 2023

Program Health

Scope: ✔ ✔ → **Resources:** ✔ ✔ ↓ **Schedule:** ✘ ✘ →

Current Status ✔ On track ⚠ At risk ✘ Off track ✔ ✔ Past / current week Status	Projected Trend Improving ↑ Holding → Declining ↓	Risk Scoring Metrics ● Very High ● High ● Medium ● Low
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Key Accomplishments (Last Week)	Upcoming Activities (Next Week)
<ul style="list-style-type: none"> As of Feb 1st, 84% of the M4.0 Conditional Pass and Did Not Pass items have been completed Transition to Operations: Agreement reached on high level support model Tier 1 IRP Student Key Dates visual has been shared on the internal IRP team Share Point site Go decision criteria first rounds completed with all teams Milestone 4.1 second check-in occurred on Feb 10th with SLT Program Risk Review meeting occurred on Feb 13th with SLT Institutional readiness results and recommended actions were shared with Steering committee 	<ul style="list-style-type: none"> Progressing on Milestone 4.1 completion Transition to Operations: High-level Workday Sustainment workshop for sponsors – agreement on Tier 2 division of work Continued progress on Go decision criteria and draft dashboard Preliminary development of briefing notes on key issues for Sponsors and Stakeholders in progress

Top Risks and Issues

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IMPACT	4 - Critical	0	0	1	1	2
	3 - High	0	1	9	0	10
	2 - Medium	0	6	0	0	6
	1 - Low	0	1	0	0	1
Total		8	10	1	1	19

New Issues +1 **Closed Issues - 0**
 • **New Very High Score Issue:**

Top Focus	Leadership Support or Action Required
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Schedule <ul style="list-style-type: none"> Schedule status is Red and is holding based on results of Milestone 4.1 second check-in Milestone 4.1 final review meeting scheduled for March 9th Continuous plan refinements in support of Milestone 4 overall success 	<ul style="list-style-type: none"> Continued off-cycle support for expedited consultation and/or decisions
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Inherent Risk Heat Map

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Current Impact	4 - Critical	0	3	0	3	6
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Total		4	29	23	11	67

New Risks +1 | Response Plans Executed - 0 | Risk Realized - 0
 • **New Very High Score Risk:**

PROGRAM HUMAN RESOURCE PROGRESS REPORT

PERIOD ENDING WEDNESDAY FEBRUARY 15, 2023

HR Reporting

HIRING G

Overview:

Actual Count: 401

Forecast: 455

Hire Completion Rate: 88%

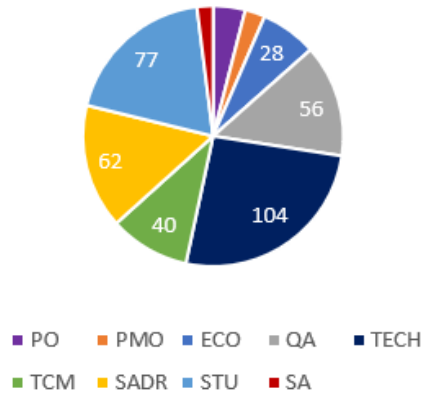
7% are Contractors

Contractor Count: 29

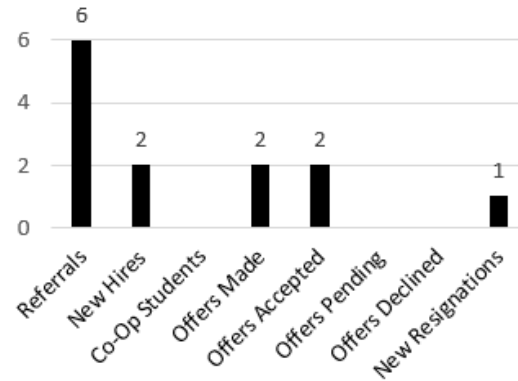
Forecasted Contractors:

31

Actual Count: 401

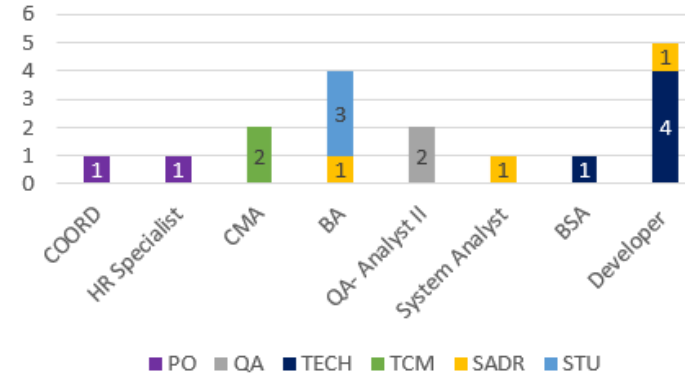


Weekly Hiring Progress



Referral Success Rate: 16.8%
101 referrals YTD 17 successful hires

Open Roles



63 Applications Received

Open Roles

- There are currently 17 open roles

Recruitment Constraints

- Available resources in the current market
- Compensation limitations
- Work term end dates

RETENTION

A

Retention Strategies:

- Completion of Yearly Performance reviews
- Monitor attrition
- Encourage Supervisors to connect with team members
- Create opportunities for development
- Refine internal process for lateral transitions

Risks

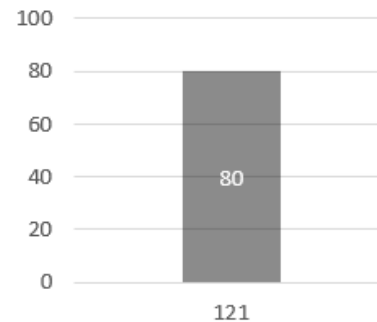
- Shortage of market resources
- Retaining staff within Academic Systems

Team Health

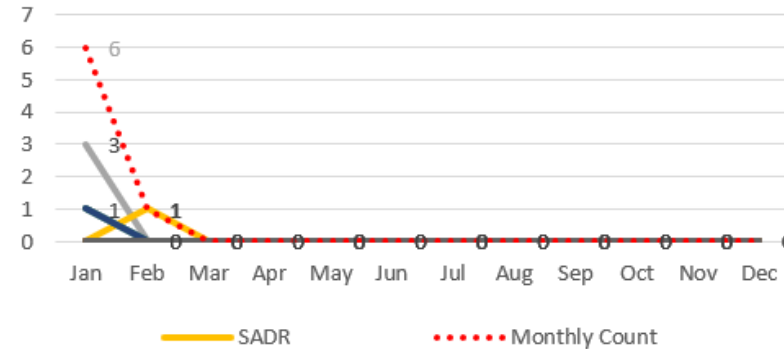
- Concerns around term-end dates and burnout

Performance Reviews

Performance Reviews: 66%



Attrition per Workstream



Attrition Count

2022

January	5	↑
February	3	
March	5	

*For comparison to 2023

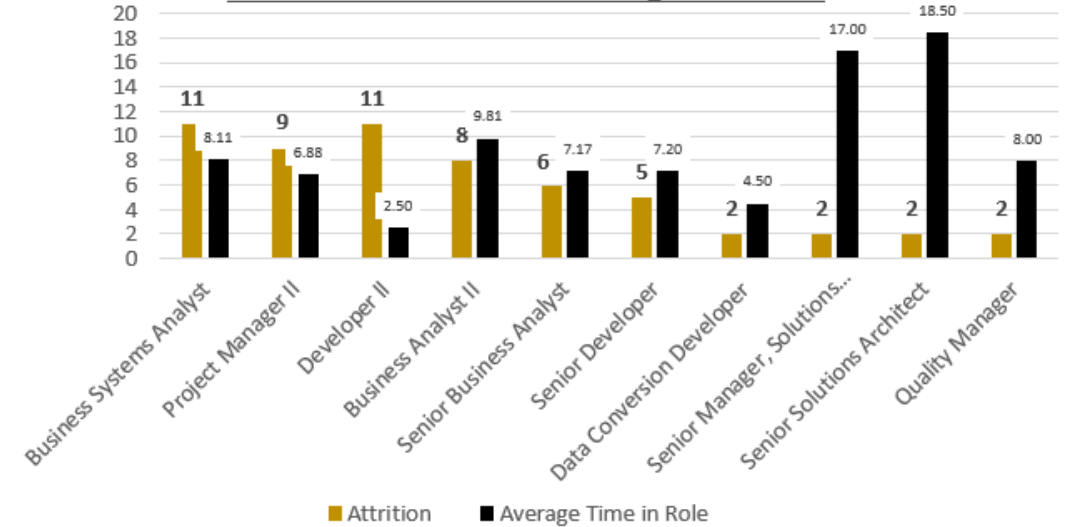
PROGRAM HUMAN RESOURCE PROGRESS REPORT

PERIOD ENDING WEDNESDAY FEBRUARY 15, 2023

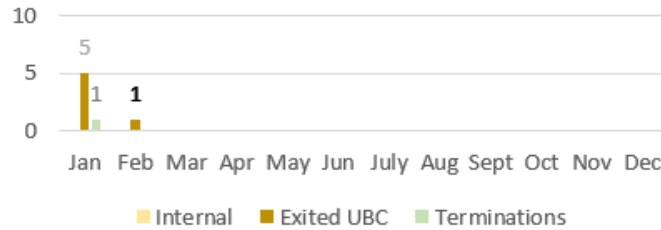
Attrition Rate per Workstream

Workstream	November 2022 Monthly %	December 2022 Monthly %	Headcount		Monthly Trend
			December 2022	2023 Actuals	
ECO	0 %	0 %	25	28	↔
PMO	0 %	0 %	8	10	↔
QA	0 %	0 %	53	56	↔
SADR	2 %	0 %	59	62	↓
STU	4 %	3 %	81	77	↓
TCM	0 %	0 %	39	40	↔
TECH	4 %	3%	95	104	↓
SA	25 %	0 %	8	8	↓

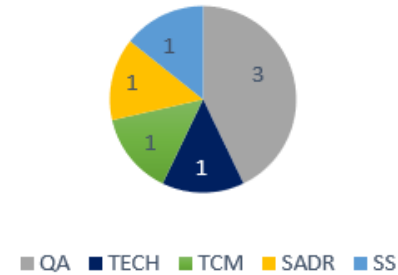
2022-2023 Role Attrition Vs Average time in role



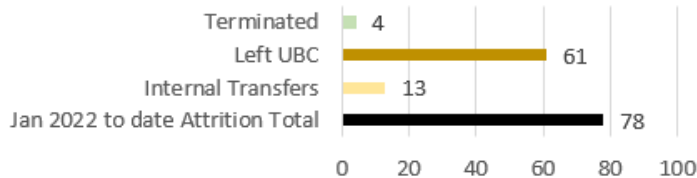
Monthly Movement: 1



2023 Attrition per Workstream: 7



2022-2023 Yearly Movement: 78



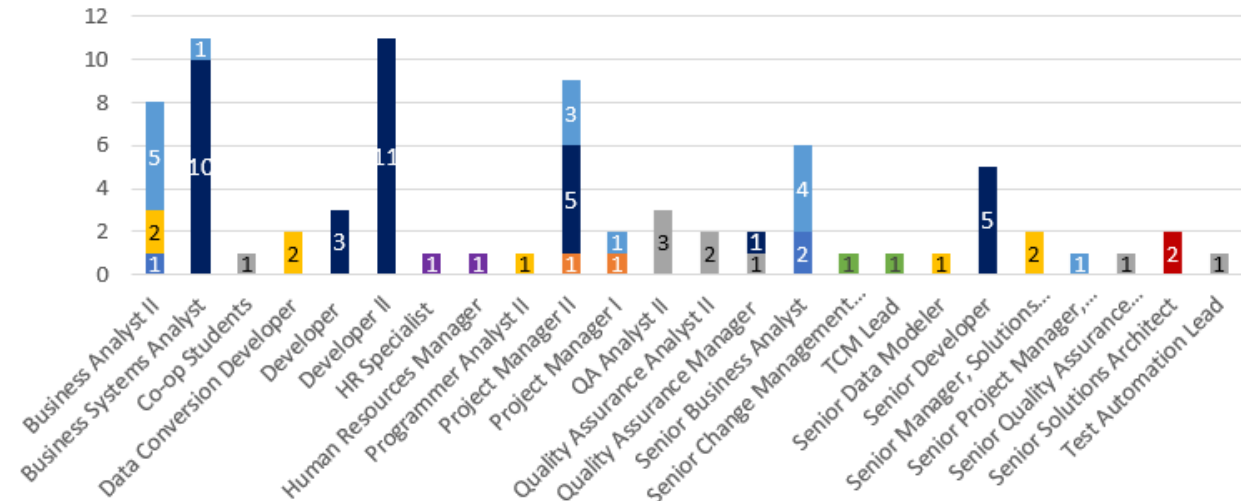
Exiting

- Personal, family and/or health issues.

Transfer

- Career advancement

2022-2023 Role Attrition per Workstream: 78



Milestone 4.1

Milestone 4.1 second check-in occurred on February 10th with SLT. M 4.1 Final Review scheduled for March 9th.

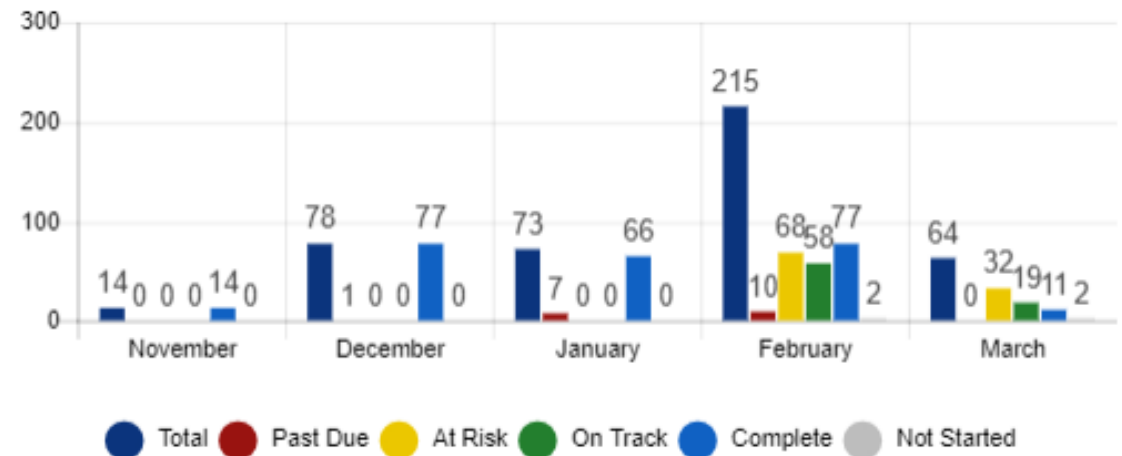
Weekly Program Progress Dashboard

Total Program Plan Items Overview

Milestone 4.1 Total Program Plan Items Overview

Milestone Summary	Weekly Variance	Overall Progress	Check Point	Check Point RAG
2872 Total Milestones	+1 Total Milestones	1473 Total Target Complete	444 Total	77 On Track
1455 Complete	+49 Complete	1455 Total Actual Complete	245 Complete	100 At Risk
889 In Progress	-3 In Progress	18 YTD Past Due	195 In Progress	18 Past Due
528 Not Started	-45 Not Started		4 Not Started	

M4.1 Monthly Progression Items



Community Call In Sessions

IRP Student Community Call-in Sessions provide a deeper dive into the functionality of the new student information system, details of changes and allow participants to ask questions.

Session Objectives:

- Provide UBC community opportunities to view design
- Provide regular updates to community and raise awareness of upcoming changes
- Use sessions to build the IRP Student Q&A database
- Build functional knowledge of Workday Student and increased understanding of changes prior to the start of end to end user training

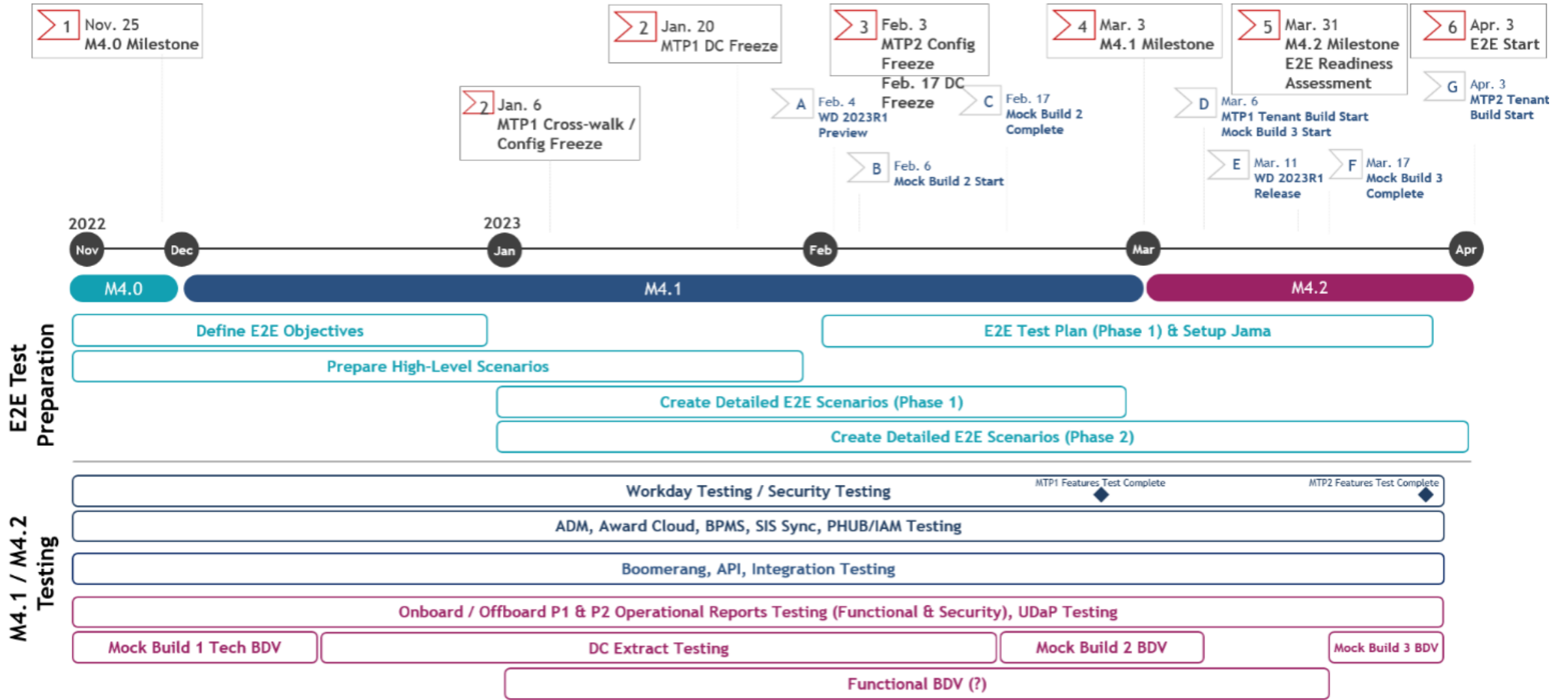
Upcoming Call In Sessions are as follows:

- Course Inheritance & Making Course Section Updates – March 2, 2023: 12:30 – 1:30PM
- Maintain & Create Course Clusters – March 14, 2023: 10:00 – 11:00AM
- Student Journey Through Registration – May 2, 2023: 10:00 – 11:00AM
- Graduate Education Session – May 30, 2023: 10:00 – 11:30AM

Additional Call in Sessions will be scheduled throughout the spring and summer

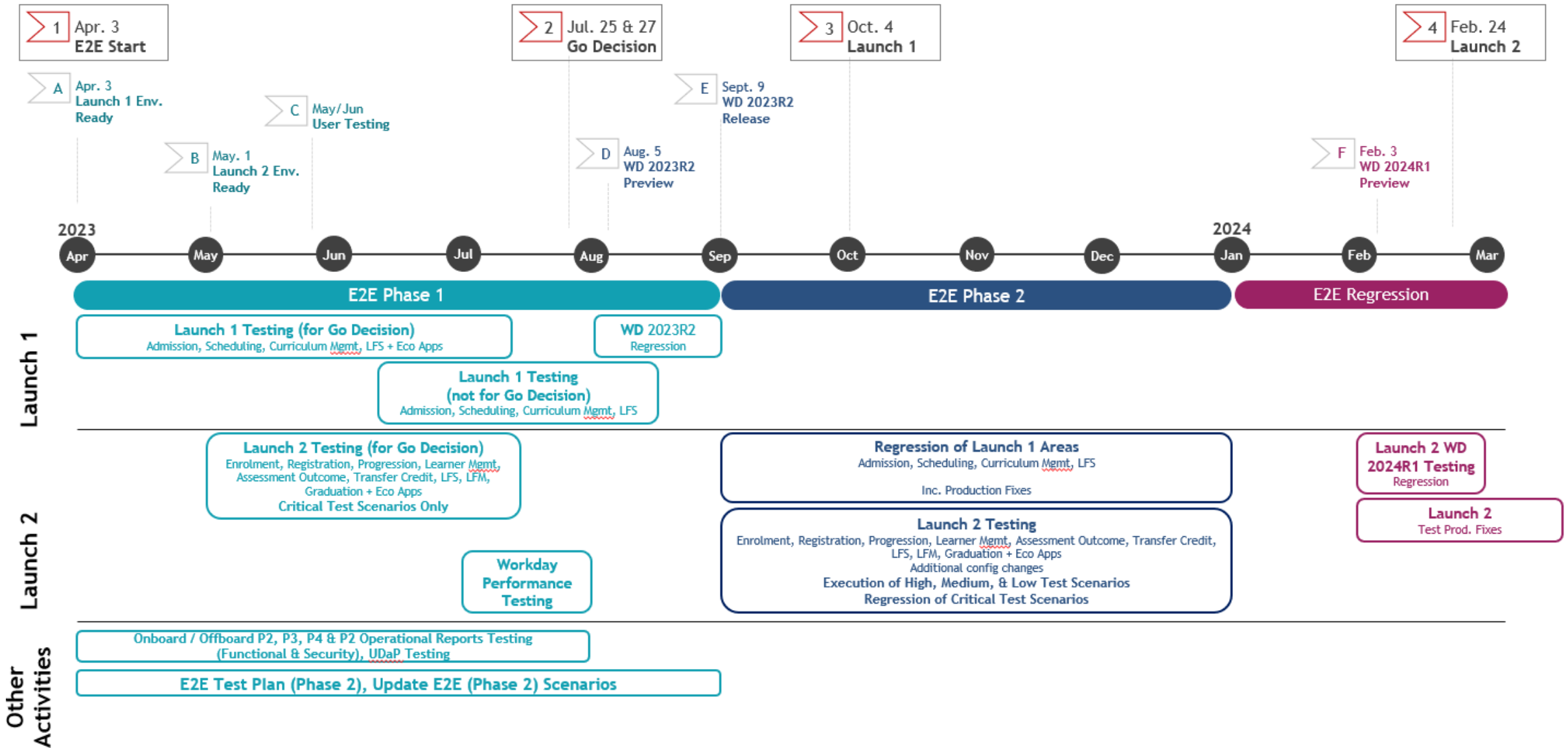
M4.1 / 4.2 & E2E Test Preparation

For Discussion



End-to-End Test Execution Timeline

For Discussion



Go Decision

- The Go Decision Criteria is underway, with criteria expected to be approved by the end of March.
 - Engage all Senior Leadership Team (SLT) members individually first to identify
 - Topic
 - Level of Detail for each topic
 - Criteria for each Detail and/or for the Topic overall
 - Method for assessing evidence of completion
 - Other variables are captured to give a holistic view across Launch 1, Launch 2, required for Go Decision, not required for Go Decision
 - Review together with all SLT members to ensure alignment and no gaps
 - Review with Governance levels
 - Once agreed, PMO will maintain and track towards Go Decision Milestone.
- Focus is on evidence based criteria for critical items AND assurance that we are on track and prepared for non critical items.

Determination for Inclusion in the Go Decision

- Per previous communications for M4 overall priorities
 - Everything in Launch 1 with some exceptions
 - Critical business and/or cross-functional capabilities from Launch 2 (e.g. matriculation)
 - Business Processes involving integrations
 - Capabilities required at specific times in academic cycle with high risk of disrupting business continuity and/or without adequate alternative solution should issues arise
 - Consideration of volume of impacted users
- Further categorization can be considered to identify areas where lower success rate of E2E Testing is acceptable in support of Go Decision.
- Items not included in the Go Decision are still intended for delivery at the appropriate MPT/Launch but may not have been tested fully at Go Decision
- **The Go Decision is set for mid-July 2023**, with IRP and UBC Governance: SLT, the Steering Committee, Executive Sponsors, ITAC, the Interim President and Vice-Chancellor, and UBC Executives

Transition to Operations - Service Delivery Model Update

High-level model developed and ready to be communicated out to key stakeholders

Reached agreement on recommended end-user service delivery model (SDM), to be presented through IRP governance for approval.

- **Support for Students – mirror ‘As Is’ model for SIS**
 - Enrolment Services to be promoted as the single point of contact for any student issues, including Workday support, (in collaboration with local Faculty Advisors, Central Administration Units).
- **Support for Staff/Faculty – mirror existing Workday platform support**
 - The Integrated Service Centre (ISC) to be promoted as the single point of contact for Workday application support for staff and faculty, in alignment with the existing ISC support model. The ISC will work in close collaboration with Enrolment Services.
- Next steps are to socialize– meetings planned with Faculties, Central Admin Units throughout March – walking through many examples and scenarios.

Transition to Operations – Sustainment Model Roadmap

Initial drafts of roadmap developed for review and approval

- Defined the high-level sustainment work necessary to sustain WD STU post go-live
- Finalizing where this work to be performed in order to do resource planning
- Developed a phased transition roadmap depicting launches, including allotted time for Hypercare and knowledge transfer
- Due to the relative lack of maturity of Workday STU (compared to FIN/HCM), considering a phased handoff of the Academic Foundation Data component (adding/changing programs of study, eligibility rules, etc.) to ensure business continuity and stabilization
- Once approved, resource plans and budgets can be finalized
- Develop Workforce transition strategy/plan to address employee transition/retention within the IRP STU program team, ISC, existing Enrolment Services and UBC IT departments

Financial Report FY 2022 - 2023 – Executive Summary

	For the month of Dec-2022			Year-To-Date Dec-2022			Annual FY 2022/23			Overall Program ¹		
	Actual	Budget	Variance	Actual	Budget	Variance	Forecast	Budget	Variance	Forecast	Budget	Variance
(in thousands)												
UBC Resource Costs	4,346	4,509	163	35,355	39,699	4,345	50,156	52,517	2,361	149,757	149,757	-
External Prime Consultants	-	-	-	2,697	2,697	0	3,596	3,596	0	13,551	13,551	-
Other Costs	309	1,341	1,032	6,662	7,825	1,163	12,326	13,488	1,162	53,618	43,618	(10,000)
Total expenses before contingency	4,655	5,850	1,195	44,713	50,221	5,508	66,078	69,601	3,522	216,926	206,926	(10,000)
Contingency - approved allocation	-	-	-	-	-	-	-	(826)	(826)	-	10,000	10,000
Contingency Remaining	-	-	-	-	27,062	27,062	-	27,062	27,062	-	68,000	68,000
Total after Contingency	4,655	5,850	1,195	44,713	77,283	32,569	66,078	95,836	29,758	216,926	284,926	68,000

Variance analysis:

For the month of December 2022:

Savings are **\$1,195k** due to:

- \$163k** UBC Resources
- **\$163k** timing - delayed hiring
- \$0k** Prime Consultants
- \$1,032k** Other Costs
- **\$1,032k** savings - FERIC lease; licenses

For Year to Date, December 2022:

Savings are **\$5,508k** due to:

- \$4,345k** UBC Resources
- **\$4,345k** timing - delayed hiring
- \$0k** Prime Consultants
- \$1,163k** Other Costs
- **\$1,105k** savings - FERIC lease; licenses
- **\$58k** timing - various

Annual Forecast for FY22/23:

Savings are **\$3,522k** due to:

- \$2,361k** UBC Resources
- **\$2,361k** timing - delayed hiring
- \$0k** Prime Consultants
- \$1,162k** Other Costs
- **\$1,187k** savings - FERIC lease; licenses

Overall Program:

- \$(10,000)k** Other Costs
- **\$(10,000)k** - Community support (PCR103)

¹ The overall IRP Student program RECAST budget was approved by the Executive Sponsors on May 11, 2022. It was presented to the BOG's Finance Committee in June 2022

Forecast based on info available as at January 5, 2023

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

Resolution

IT IS HEREBY RESOLVED that the Finance Committee recommends to the Board of Governors approval of a funding release of \$99.2 million (including contingency) in fiscal year 2023-2024 within a total program envelope of \$284.9 million (including contingency), in accordance with Board 3 approval received in June 2021.



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](#)