



SUBJECT	Integrated Renewal Program (IRP) Student – Update
SUBMITTED TO	Finance Committee
MEETING DATE	June 14, 2023
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	Gage Averill, Provost and Vice-President Academic, UBC Vancouver 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 Joanne Fox, Principal, UBC Vantage College Rella Ng, Associate Vice-President Enrolment Services and Registrar Bert Annear, Deputy Registrar, UBC Okanagan Ian Cavers, Lead Academic Sponsor Shelly Morrison, Senior Director, Financial Services & Strategic Procurement 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 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 [March 11, 2023](#) IRP Student provided an overall program update, and highlighted program activities. Approval was granted for a funding release of \$99.2 million (including contingency) in fiscal year 2023-2024.

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.

The IRP Student program has forged ahead and accomplished a great deal. Both Scope and Resources are reporting on track (green) on the Status Report. Schedule remains red as the team navigates Milestone 5 deliverables. Overall the Program Health indicator shows IRP Student “At Risk” but holding.

Risks are being tracked and mitigations are monitored on a weekly basis. The key risks for the Program at this time relate to delays in End-to-End Testing training due to revised timelines, and the possible overall delay of training materials development caused by the delay in E2E testing.

Milestone 4 deliverables were significant. The Program reached an overall 85% pass rate of deliverables, with approximately 15% moving outside of M4 into M5 or beyond. The Consolidated plan continues to be closely monitored and revised when necessary to meet revised execution strategies, re-prioritization and resulting re-sequencing of activities.

Milestone 5, Testing, began on April 3rd with community testing starting in May for Stage 1 and June for Stage 2. E2E test cases are complete and the testing dashboard is live and reported on weekly. E2E is based around functionality and prioritized by launch. Testing is vital to ensure that core capabilities are functioning as expected and to provide empirical evidence to support the July Go Decision sessions.

At this point in the timeline the focus shifts from the technical build and transitions to community preparedness. The Transformation & Change Management team are aligned and ramping up engagements and communication with the UBC community. The team is building numerous resources and materials that will be shared with units, faculties, and students to ensure they are aware of the changes, are properly trained and adequately resourced. The second Institutional Readiness Assessment (IRA) was completed in May 2023. Results will be shared as they become available. A third and final IRA will take place in fall of 2023.

A financial summary of IRP Student for year to date as of March 2023 has been included. The savings listed are due mostly to timing variance, and will be offset in the next fiscal year.

APPENDICES

1. 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.

At this time no changes in Scope have been identified. The team wrapped up Milestone 4 and are now a month into Milestone 5, the Testing phase. Test cases have been completed and the E2E testing dashboard is live and viewed by program leadership on a weekly basis. The TCM team is ramping up with significant increases in community engagements and communications.

Schedule remains at risk, but has shifted from a steady trajectory to an upward trajectory based on the completion of Milestone 4. Progress is being made on the Transition to Operations work, preparation for the Go Decision in July continues, and the second Institutional Readiness Survey has been completed. Milestone 5 is progressing, and SLT continue to reprioritize where necessary to meet the timeline. The focus continues to be on the critical plan items and deliverables. The second M5 check-in with the Senior Leadership Team (SLT) is booked for May 31. Schedule is a top focus for the team and continuous plan refinements are occurring to stay on track.

Resources remain green, with a shift from steady state to trending downward. The hire completion rate for the program is at nearly 100% with approximately 7% of the team hired as contractors. Wave 3 hiring 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 analyzes trends and continues to verify retention strategies. Leadership is monitoring individual and overall team health, as there are concerns around burnout. Hiring is winding down and the shift focuses to retention strategies as staff begin to think about program end dates. To help address questions or concerns around term endings and future roles in the Transition to Operations support organization the HR team is holding monthly team sessions where staff can receive updates and ask questions.



IRP STUDENT PROGRAM STATUS

PREPARED BY IRP PMO, PERIOD ENDING WEDNESDAY MAY 10, 2023

Program Health Overall:

Scope: → Resources: ↓ Schedule: ↑

Status Indicator	Projected Risk Trend	Risk Indicators
On Track	↑ Improving	Very High
At Risk	→ Holding	High
Off Track	↓ Declining	Medium
		Low

Key Accomplishments Last Week:	Upcoming Activities Next Week:
<ul style="list-style-type: none"> Transition to Operations (TOPS): <ul style="list-style-type: none"> Continued Service Model Rollout Finalizing Org Design & Budget Workforce Transition Steering Committee meeting Re-strategize End-to-End (E2E) prioritization Progress on documentation approaches to the Go Decision recommendation Progress on Community Support Funding (CSF) requests backlog Program readiness review approval for utilizing Workday tool prior to Launch 2 Draft design summary on Admissions presented to Steering Committee and feedback will be incorporated and further tested version 1.0 to be shared with the community 	<ul style="list-style-type: none"> TOPS: <ul style="list-style-type: none"> Workforce Transition HR Directors Working Group Kickoff Hypercare Working Group Kickoff Continued Service Model Rollout Communications Planning E2E testing begins for Launch 2 Priority 1 (P1) Finalize first set of IRP Student Snapshots based on feedback and validation with stakeholders Planning for June 16 in person IRP Student Team Meeting

Top Risks and Issues

Issue Heat Map

		URGENCY				Total
		1 - Low	2 - Medium	3 - High	4 - Critical	
IMPACT	4 - Critical			1		1
	3 - High		1	11		12
	2 - Medium		4	2	1	7
	1 - Low					
Total		5	14	1		20

New Issues 1 Closed Issues 1

New Very High Score Issue:

Top Focus Leadership Support or Action Required

Schedule	Leadership Support or Action Required
<ul style="list-style-type: none"> Milestone 5 planning continues Milestone 5 second check-in scheduled for May 31st Continued focus on Critical plan items and deliverables 	<ul style="list-style-type: none"> Continued off-cycle support for expedited consultation and/or decisions Support for increase in Community Engagement

Inherent Risk Heat Map

		Current Probability				Total
		1 - Unlikely	2 - Possible	3 - Likely	4 - Almost Certain	
Current Impact	4 - Critical		3		2	5
	3 - High	2	11	5	1	19
	2 - Medium		11	10	4	25
	1 - Low	1	1	1		3
Total		3	26	16	7	52

New Risks 5 | Response Plans Executed 0 | Risk Realized 0

New Very High Score Risk:



KEY RISKS

The IRP Student Program and the PMO report on risks and issues on a weekly basis. While the top pressure on the Program remains timeline, the team is currently monitoring risks related to End-to-End (E2E) delays due to revised development/build and E2E testing timelines, which created a risk related to the delay of training materials and delivery.

Risk 77 – Training materials development delayed by revised E2E testing timeline (start delayed from Jan 2023 to April 2023)

Risk 138 – End to end training delivery delayed by revised development/build and E2E testing timelines (start delayed from Jan 2023 to April 2023)

The E2E delays create a risk that training materials for Launch 1 may 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 the Transformation & Change Management (TCM) team during the Launch 1 Hypercare period.

To mitigate these risks the TCM Training team is working to get access to the correct tenant to develop advanced user training materials.

In addition, there is concern around the staffing levels within the Security, Access, Data, and Reporting (SADR) team around capacity and volume of work.

Risk 156 – Insufficient UDaP Team Resourcing for Volume of Work

As a result of staff turnover, upcoming parental leave, late delivery of dependencies, and the large volume of additional scope, there is a risk the UDaP team will not have sufficient resources to complete all deliverables within current timelines, which would lead to critical deliverables not being completed in time for the start of E2E testing or the Go Decision.

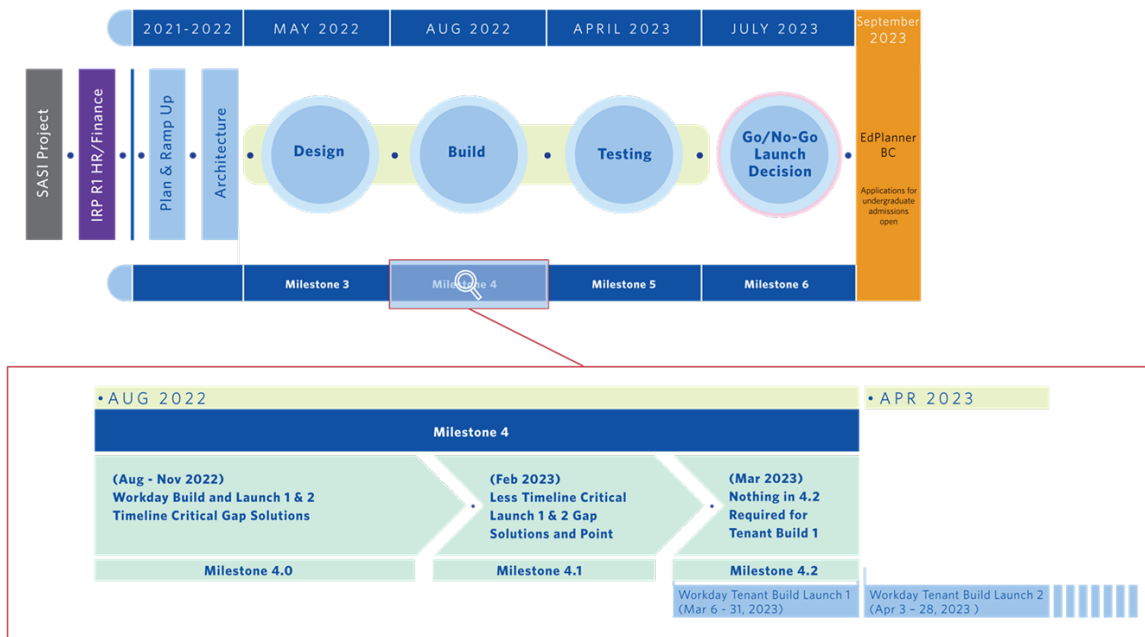
To mitigate this risk a Change Request has been submitted for additional resources to address the gaps.

All of the risks identified currently have mitigation plans in place, and are actively monitored.



MILESTONE 4 OVERALL

Milestone 4, the Build phase, was broken into 3 phases due to its size and complexity. This allowed for an agile approach and the ability to prioritize and resequence work based on criticality and need.



As M4 progressed adjustments were made to the total number of deliverables. The original count in October 2022 was baselined at 986 deliverables and ended at 988 deliverables by the end of March 2023.

To help mitigate the volume of work required in M4 and to maintain the timeline a Key Dates Timeline workshop was held which highlighted the critical path, added additional key activities, and dependencies such as program freeze periods. At this time criteria for the Go Decision was approved and the E2E Testing framework was confirmed. Overall increased details and the building of forward-looking plans allowed for flexibility within and between program teams.

Of the 988 Milestone 4 deliverables, 836 “Passed” by their Milestone date, giving the program an approximate pass rate of 85% overall.

155 deliverables moved out of Milestone 4 to Milestone 5 or beyond and of the 155 moved deliverables, 109 were on the Critical path and 46 were deemed Non-Critical.

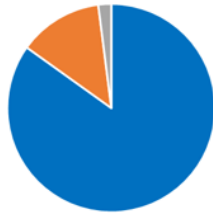


▪ Deliverables Results

- Overall count: 501
- Pass – 426 or 85%
- Conditional Pass – 65 or 13%
- Did not Pass – 10 or 2%

Critical	Non Critical
421	80
355	71
56	9
10	0

Milestone 4.0 Deliverables Results Breakdown



■ Deliverables Passed ■ Deliverables Conditionally Passed ■ Deliverables Did not Pass

As of Mar 9/23 including evidence status:

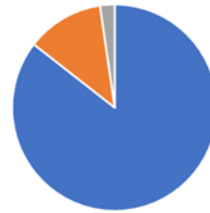
- Original count as of March 3/23: 314*
- True-up count: 304 (Critical: 200, Non Critical: 104)
- Pass – 263 or 86.5% (Critical: 170, Non Critical: 93)
- Conditional Pass – 34 or 11.2% (Critical: 24, Non Critical: 10)
- Did not Pass – 7 or 2.3% (Critical: 6, Non Critical: 1)

As of Mar 31/23 based on % complete and evidence:

- Count as of March 31/23: 170
- Pass – 144 or 84.7%
- Conditional Pass – 16 or 9.4%
- Did not Pass – 10 or 5.9%

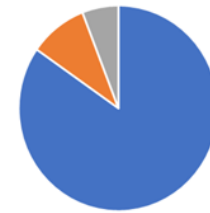
Critical	Non-Critical
99	71
85	59
7	9
7	3

Milestone 4.1 Deliverables Results Breakdown



■ Deliverables Passed ■ Deliverables Conditionally Passed ■ Deliverables Did not Pass

Milestone 4.2 Deliverables Results Breakdown



■ Deliverables Passed ■ Deliverables Conditionally Passed ■ Deliverables Did not Pass



Milestone 4 was a monumental task for the team. A significant amount of work was accomplished. On average the Program completed approximately 120 deliverables per month during Milestone 4.

The program is closely tracking top risks related to Milestone 4 and is monitoring mitigations and possible impacts on Milestone 5. The top risks include:

- Development delays resulting in late unit testing, may result in a higher than anticipated volume of defects during E2E testing
- Ongoing development and configuration changes may necessitate significant re-testing
- E2E Testing velocity
- Challenges maintaining velocity for defect resolution and catchup conversions
- Student Solutions workload to provide support to other teams, and also for Senate-approved changes

MILESTONE 5 TESTING

While the nature of Milestone 4 and 5 are different, the same rigorous approach will be used. Milestone 5, Testing, is 3.5 months in duration and includes approximately 260 deliverables. The first M5 check in took place on May 1st, with the second check-in scheduled for May 31st. End-to-End testing is now underway, with Community Testers beginning testing Stage 1 items in May and Stage 2 items in June. E2E results will provide empirical evidence for the Go Decision slated for July 2023. E2E testing is a high priority for the entire IRP Student team.

INSTITUTIONAL READINESS:

IRP Student is conducting a series of Institutional Readiness Assessments (IRA) to gauge how prepared the UBC community is for the coming changes and to assess their readiness to adapt to the new ways of working. The first IRA was completed in late fall 2022 with 878 members of the UBC community, with both Vancouver and Okanagan providing feedback.

Below you will find the major takeaways and subsequent steps taken thus far to support the results of the first Institutional Readiness Assessment:

- **Awareness** - The initial Institutional Readiness Assessment results indicated a need for greater community awareness around why UBC is moving to a new student information system. IRP Student continues to socialize the need for a new modern, reliable, and secure SIS, as well as highlighting the benefits of moving to Workday Student. Faculty members, specifically, were uncertain of how they will be impacted. In response to this need a faculty resource page was built on the IRP website that is regularly updated with relevant information by the Transformation and Change Management (TCM) team.
- **Understanding** - To ensure our community's awareness and understanding of the upcoming changes continues to develop, Community Call-in Sessions are being held to provide further details about Workday Student. In addition, area specific 'Change Bundles' have been curated with relevant detailed information around changes to workflow and business processes for



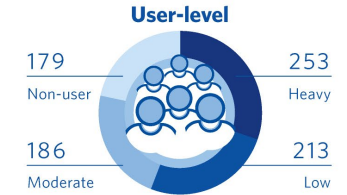
impacted SIS users, along with Design Summaries which highlight the degree of change impact for each functionality.

- **Transparency** - IRP Student recognizes the need for impacted stakeholders to understand what to expect, including what their roles and responsibilities will be. As such, IRP Student has created a birds-eye view graphic highlighting activities the community can expect ahead of Launch 1. All asks of the community will be funneled through the Transition Network, and will provide adequate time for planning and responses.
- **Support** – Strong resources and support for the community remains the focus of the TCM team. The program is working to building Workday Student confidence in the community by communicating what resources will be available to help them prepare for the transition, including training plans and timelines to allow for planning and effective resourcing.

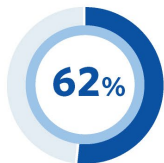


WORKDAY STUDENT | How ready is UBC?

The Institutional Readiness Assessment (IRA) IRP Student's process for assessing community preparedness for the upcoming changes and new ways of working when Workday Student launches.



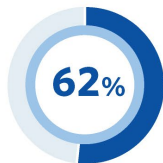
Please note: While 878 members of the UBC community participated in this survey, some responses in relation to identification (campus, role, etc.) were not mandatory.



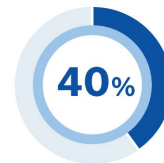
Understand the compelling need for change



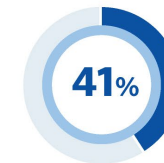
Perceive leadership is aligned & committed



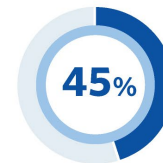
Support the upcoming changes



Perceive a manageable level of impact to their capacity



Feel they are receiving effective information through communications channels.



Feel prepared and ready for the change



Are confident in the level of training to be provided

NEXT STEPS



Further **analyze** results in partnership with the Transition Network to develop recommended actions for Faculties & Units.



Funnel all community questions into one central location to provide effective and accurate support.



Continue to socialize the rationale replacing the current SIS, as well as the **benefits** of transitioning to Workday Student.



Send two future surveys to **measure** progress and capture changes in UBC's readiness levels.





The second iteration of the IRA concluded in May 2023. Results will be shared once the data has been tabulated. There will be one final iteration of the Institutional Readiness Assessment in the fall of 2023. IRP Student will continue to carefully monitor and measure UBC's readiness progress as we move towards Launch 1.

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 March 2023 Savings are \$9,562K. The variance is due to \$2,092K related to UBC Resources, including an approved Change Request for additional resources for the Security, Access, Date, and Reporting (SADR) team, which were covered by crystalized savings. Additional savings were due to delayed hiring (\$3,702K) and Other Costs including \$1,074K savings in relation to the termination of the FERIC lease and \$6,417K related to timing of items such as: interdependent projects, licenses, recruiting, and training. The positive FY2022/2023 variances will be offset in the next fiscal year.



(in thousands)

	For the month of Mar-2023			Year-To-Date Mar-2023			Annual FY 2022/23			Overall Program ¹		
	Actual	Budget	Variance	Actual	Budget	Variance	Actual	Budget	Variance	Forecast	Budget	Variance
UBC Resource Costs	5,568	3,676	(1,892)	50,425	52,517	2,092	50,425	52,517	2,092	149,757	149,757	-
External Prime Consultants	-	-	-	3,596	3,596	0	3,596	3,596	0	13,551	13,551	-
Other Costs	(1,554)	4,754	6,307	6,018	13,488	7,470	6,018	13,488	7,470	53,618	43,618	(10,000)
Total expenses before contingency	4,014	8,430	4,416	60,039	69,601	9,562	60,039	69,601	9,562	216,926	206,926	(10,000)
Contingency - approved allocation	-	-	-	-	-	-	-	(840)	(840)	-	10,000	10,000
Contingency Remaining	-	-	-	-	27,076	27,076	-	27,076	27,076	-	68,000	68,000
Total after Contingency	4,014	8,430	4,416	60,039	96,677	36,638	60,039	95,836	35,798	216,926	284,926	68,000

Variance analysis:

For the month of March 2023:

Variance of **\$4,416k** due to:
\$(1,892)k UBC Resources
 - additions **\$(81)k** - SADR (PCR2/PCR103)
 - timing **\$(1,398)k** - accrued vacation liability
 - timing **\$(413)k** - various
\$6,307k Other Costs
 - additions **\$(7)k** - Comm. Support (PCR57)
 - timing **\$6,314k** - various (Interdependent projects, Licenses, Recruiting, Training, etc.)

For Year to Date, March 2023:

Variance of **\$9,562k** due to:
\$2,092k UBC Resources
 - additions **\$(212)k** - SADR (PCR2/PCR103)
 - timing **\$(1,398)k** - accrued vacation liability
 - timing **\$3,702k** - delayed hiring
\$7,470k Other Costs
 - savings **\$1,074k** - FERIC lease; licenses
 - additions **\$(21)k** - Comm. Support (PCR57)
 - timing **\$6,417k** - various (Interdependent projects, Licenses, Recruiting, Training, etc.)

Annual Forecast for FY22/23:

Variance of **\$9,562k** due to:
\$2,092k UBC Resources
 - additions **\$(212)k** - SADR (PCR2/PCR103)
 - timing **\$(1,398)k** - accrued vacation liability
 - timing **\$3,702k** - delayed hiring
\$7,470k Other Costs
 - savings **\$1,074k** - FERIC lease; licenses
 - additions **\$(21)k** - Comm. Support (PCR57)
 - timing **\$6,417k** - various (Interdependent projects, Licenses, Recruiting, Training, etc.)

Overall Program:

Variance of **\$(10,000)k** due to:
\$(10,000)k Other Costs
 - additions **\$(10,000)k** - Comm. Support (PCR57)

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 April 7, 2023

The positive FY22/23 variances in UBC Resources and Other Costs are timing and will be offset in the next FY's



NEXT STEPS

It remains a busy time for the IRP Student team. The focus for the upcoming weeks is to complete End-to-End testing. There will also be a greater focus on training for the community, and continued engagement around institutional readiness. Schedule remains tight; however, the team is working diligently to remain on track to deploy to the current timeline and to prepare for the Go Decision.

IRP Student Update

Finance Committee

June 2023 – Open Session

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 and Academic Director, UBC Vantage College
Dr. Ian Cavers, Lead Academic Sponsor
Corinne Pitre-Hayes, Program Director, Integrated Renewal Program Student



Agenda

Key Topics

- Status Report
- Key Risks
- Milestone 4: Overall
- Milestone 5: Testing
- Institutional Readiness
- Financial Report

IRP STUDENT PROGRAM STATUS

PREPARED BY IRP PMO, PERIOD ENDING WEDNESDAY MAY 10, 2023

Program Health Overall:

Scope: Resources: Schedule:

Status Indicator	Projected Risk Trend	Risk Indicators
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Key Accomplishments Last Week:

- Transition to Operations (TOPS):
 - Continued Service Model Rollout
 - Finalizing Org Design & Budget
 - Workforce Transition Steering Committee meeting
- Re-strategize End-to-End (E2E) prioritization
- Progress on documentation approaches to the Go Decision recommendation
- Progress on Community Support Funding (CSF) requests backlog
- Program readiness review approval for utilizing Workday tool prior to Launch 2
- Draft design summary on Admissions presented to Steering Committee and feedback will be incorporated and further tested version 1.0 to be shared with the community

Upcoming Activities Next Week:

- TOPS:
 - Workforce Transition HR Directors Working Group Kickoff
 - Hypercare Working Group Kickoff
 - Continued Service Model Rollout
 - Communications Planning
- E2E testing begins for Launch 2 Priority 1 (P1)
- Finalize first set of IRP Student Snapshots based on feedback and validation with stakeholders
- Planning for June 16 in person IRP Student Team Meeting

Top Risks and Issues

Issue Heat Map

		URGENCY				
		1 - Low	2 - Medium	3 - High	4 - Critical	Total
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Total		5	14	1		20

New Issues 1 **Closed Issues 1**

New Very High Score Issue:

Top Focus

- Schedule**
- Milestone 5 planning continues
 - Milestone 5 second check-in scheduled for May 31st
 - Continued focus on Critical plan items and deliverables

Leadership Support or Action Required

- Continued off-cycle support for expedited consultation and/or decisions
- Support for increase in Community Engagement

Inherent Risk Heat Map

		Current Probability				
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Current Impact	4 - Critical		3		2	5
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New Risks 5 | Response Plans Executed 0 | Risk Realized 0

New Very High Score Risk:

PROGRAM RISK REGISTER

PERIOD ENDING WEDNESDAY MAY 10, 2023

Risks	Updates
Current Top Risks (Score = Very High)	
<p><u>Risk 138</u> – End to end training delivery delayed by revised development/build and E2E testing timelines</p> <p>The E2E delays create a risk that training materials for Launch 1 may 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 the Transformation & Change Management (TCM) team during the Launch 1 Hypercare period.</p>	<p>Recent Update:</p> <ul style="list-style-type: none"> TCM Training team is working to get access to the correct Workday tenant to develop advanced user training materials Training planning for Launch 1 concluded May 3. Launch 1 training to commence from June 2023 - August 2023.
<p><u>Risk 156</u> – Insufficient UDaP Team Resourcing for Volume of Work</p> <p>As a result of staff turnover, upcoming parental leave, late delivery of dependencies, and the large volume of additional scope, there is a risk the University Data Platform (UDaP) team will not have sufficient resources to complete all deliverables within current timelines, which would lead to critical deliverables not being completed in time for the start of E2E testing or the Go Decision.</p>	<p>Recent Update:</p> <ul style="list-style-type: none"> Program Director and Finance has recommended to a Change Request to fund additional resources for the UDaP team
<p><u>Risk 77</u> – Training materials development delayed by revised E2E testing timeline</p> <p>The E2E delays create a risk that training materials for Launch 1 may 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 the Transformation & Change Management (TCM) team during the Launch 1 Hypercare period.</p>	<p>Recent Update:</p> <ul style="list-style-type: none"> TCM Training team is working to get access to the correct Workday tenant to develop advanced user training materials Training team content development for launch 1 Advanced User training is on track

IRP Student - Milestone 4 Overall – Plan and Approach

Considerations for defining the phases of Milestone 4:

- Capabilities and business processes required for the Program Go Decision in late July 2023
- Timing of when the capabilities will be used during the Academic cycle
- Level of effort/complexity
- Number of community members impacted
- Overall risk and mitigations for a given capability if delays occur

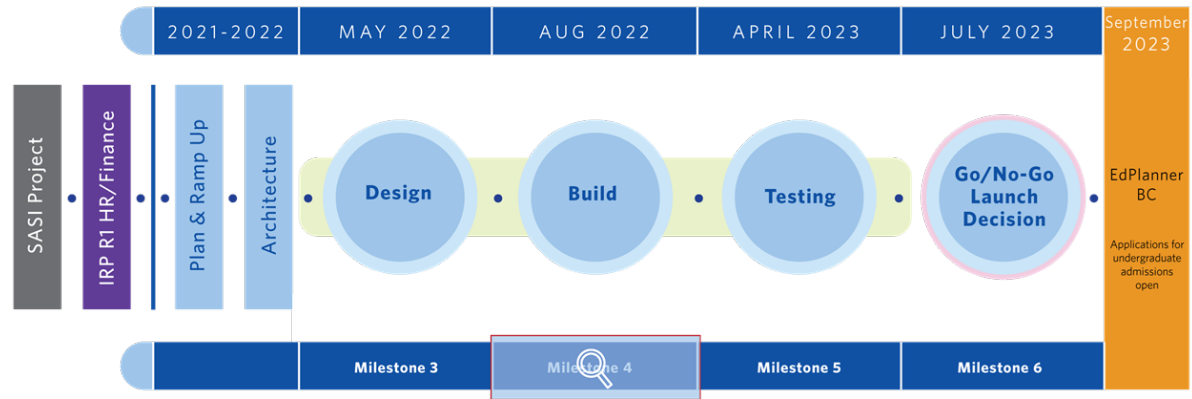
Definitions:

- M 4.0: Majority of deliverables to be completed by the end of November 2022
- M 4.1: Deliverables completed for the Launch 1 Workday Tenant Build in February 2023
- M 4.2: Deliverables completed for the Launch 2 Workday Tenant Build in March 2023

Core deliverables for Milestone 4 are detailed design and build and tested locally

Independent unit testing by the QA team was performed on best effort basis based on the availability of configuration and/or development

IRP Student - Milestone 4



IRP Student - Milestone 4 Overall – Results

Progress throughout Milestone 4 Overall – **836 Deliverables “Passed” by Milestone date**

- Three separate milestones each with their own starting and end point
- End results remained consistent throughout

Deliverables Results

- Overall count: **501**
- Pass – 426 or **85%**
- Conditional Pass – 65 or 13%
- Did not Pass – 10 or 2%

Critical	Non Critical
421	80
355	71
56	9
10	0

As of Mar 9/23 including evidence status:

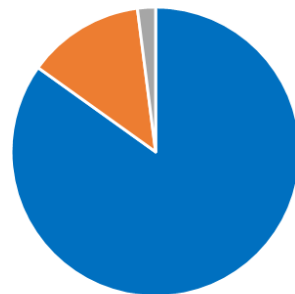
- Original count as of March 3/23: 314*
- True-up count: 304 (Critical: 200, Non Critical: 104)
- Pass – 263 or **86.5%** (Critical: 170, Non Critical: 93)
- Conditional Pass – 34 or 11.2% (Critical: 24, Non Critical: 10)
- Did not Pass – 7 or 2.3% (Critical: 6, Non Critical: 1)

As of Mar 31/23 based on % complete and evidence:

- Count as of March 31/23: 170
- Pass – 144 or **84.7%**
- Conditional Pass – 16 or 9.4%
- Did not Pass – 10 or 5.9%

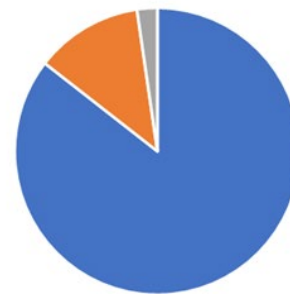
Critical	Non-Critical
99	71
85	59
7	9
7	3

Milestone 4.0 Deliverables Results Breakdown



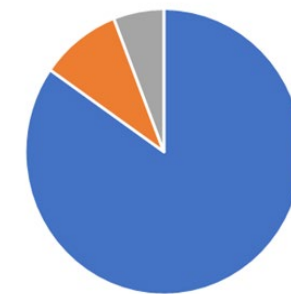
■ Deliverables Passed ■ Deliverables Conditionally Passed ■ Deliverables Did not Pass

Milestone 4.1 Deliverables Results Breakdown



■ Deliverables Passed ■ Deliverables Conditionally Passed ■ Deliverables Did not Pass

Milestone 4.2 Deliverables Results Breakdown



■ Deliverables Passed ■ Deliverables Conditionally Passed ■ Deliverables Did not Pass

Milestone 4 Overall - Deliverables Movement - Topics

Overall, 155 were moved outside of Milestone 4 – 109 Critical and 46 Non-Critical

Breakdown of the moved Critical deliverables is shown below.

Topic	Approximate #s	Mitigation
Multiple	20	n/a - Completed
Multiple	7	n/a - Archived
LFS Integrations	7	Formally deferred
Ecosystem and other development	40	Rescheduled to later based on plan alignment and priority
Testing/Compliance	35	Per the agreed upon approach, testing in parallel with E2E

Of the Critical deliverables that moved to M5 and are noted as Past Due or Needs Help: 7*

- Six (6) are past due per the Status Report - various topics testing related
- Only one (1) is noted as Needs Help

***Update:** as of May 17, 2023 - 4 are now 100% complete, 1 rescheduled and on track, 2 remain past due, 0 Need Help.

IRP Student - Milestone 4 Overall – Summary

- Overall, we consider that Milestone 4 was successful with roughly 85% pass rate and overall a 16% movement percent.
- On average the Program completed approximately 120 deliverables per month
- While the nature of the milestones are different, Milestone 5 is 3.5 months in duration and includes approximately 260 deliverables
- Some of our top risks:
 - Development delays resulting in late unit testing, may result in a higher than anticipated volume of defects within E2E testing cycle
 - Ongoing development and configuration changes may result in additional re-testing
 - E2E Testing velocity
 - Challenges maintaining velocity for defect resolution and catchup conversions
 - Student Solutions workload to provide support to other teams, and also for Senate-approved changes
- Mitigation Activities are in place and being carefully monitored

WORKDAY STUDENT

How ready is UBC?

The Institutional Readiness Assessment (IRA) IRP Student's process for assessing community preparedness for the upcoming changes and new ways of working when Workday Student launches.



Please note: While 878 members of the UBC community participated in this survey, some responses in relation to identification (campus, role, etc.) were not mandatory.



Understand the compelling need for change



Perceive leadership is aligned & committed



Support the upcoming changes



Perceive a manageable level of impact to their capacity



Feel they are receiving effective information through communications channels.



Feel prepared and ready for the change



Are confident in the level of training to be provided

NEXT STEPS



Further **analyze** results in partnership with the Transition Network to develop recommended actions for Faculties & Units.



Funnel all community questions into one central location to provide effective and accurate support.



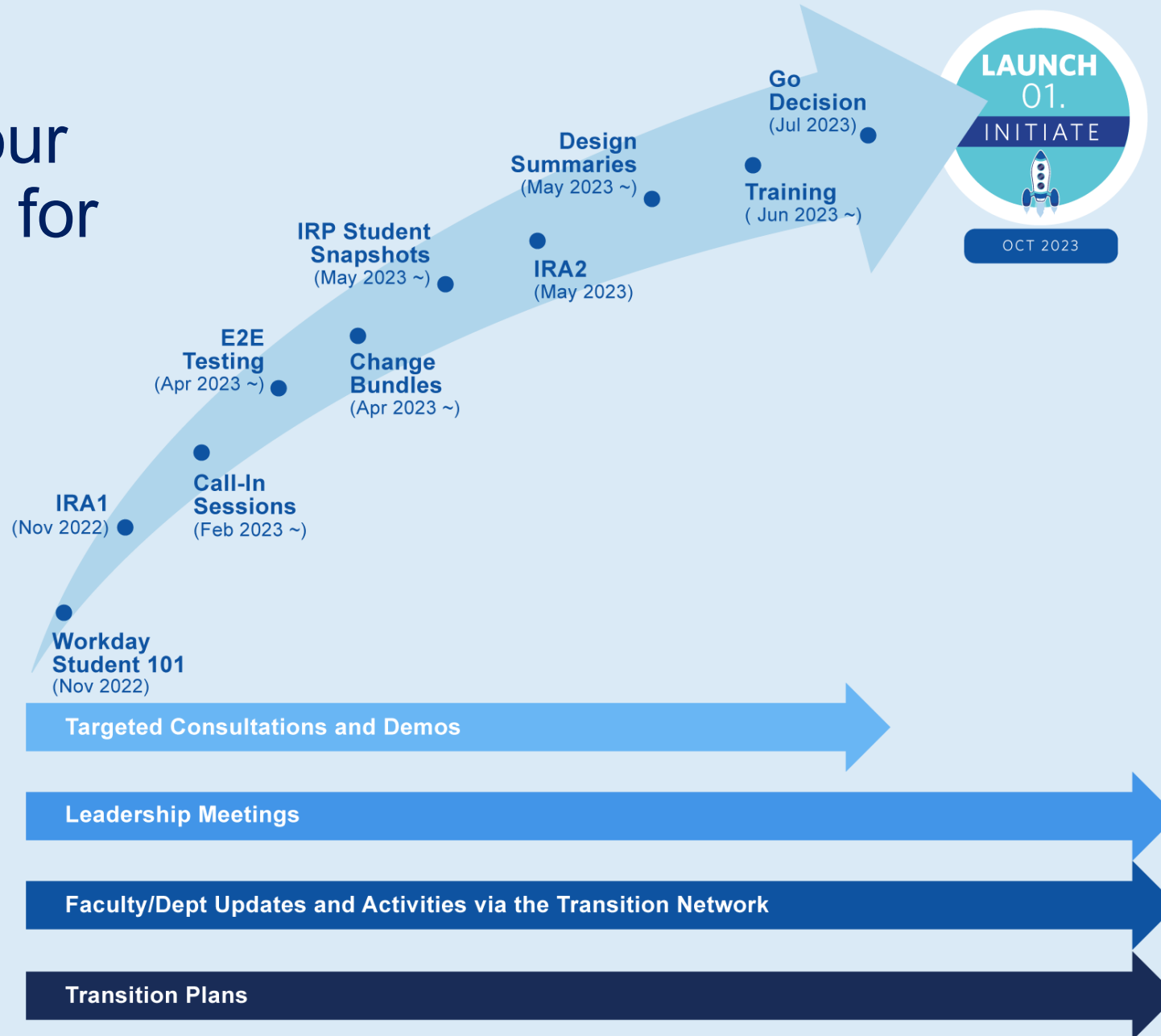
Continue to socialize the rationale replacing the current SIS, as well as the **benefits** of transitioning to Workday Student.



Send two future surveys to **measure** progress and capture changes in UBC's readiness levels.



Preparing our Community for Launch



Financial Report FY22/23 – Executive Summary

	For the month of Mar-2023			Year-To-Date Mar-2023			Annual FY 2022/23			Overall Program ¹		
	Actual	Budget	Variance	Actual	Budget	Variance	Actual	Budget	Variance	Forecast	Budget	Variance
(in thousands)												
UBC Resource Costs	5,568	3,676	(1,892)	50,425	52,517	2,092	50,425	52,517	2,092	149,757	149,757	-
External Prime Consultants	-	-	-	3,596	3,596	0	3,596	3,596	0	13,551	13,551	-
Other Costs	(1,554)	4,754	6,307	6,018	13,488	7,470	6,018	13,488	7,470	53,618	43,618	(10,000)
Total expenses before contingency	4,014	8,430	4,416	60,039	69,601	9,562	60,039	69,601	9,562	216,926	206,926	(10,000)
Contingency - approved allocation	-	-	-	-	-	-	-	(840)	(840)	-	10,000	10,000
Contingency Remaining	-	-	-	-	27,076	27,076	-	27,076	27,076	-	68,000	68,000
Total after Contingency	4,014	8,430	4,416	60,039	96,677	36,638	60,039	95,836	35,798	216,926	284,926	68,000

Variance analysis:

For the month of March 2023:

Variance of **\$4,416k** due to:

\$(1,892)k UBC Resources

- additions **\$(81)k** - SADR (PCR2/PCR103)
- timing **\$(1,398)k** - accrued vacation liability
- timing **\$(413)k** - various

\$6,307k Other Costs

- additions **\$(7)k** - Comm. Support (PCR57)
- timing **\$6,314k** - various (Interdependent projects, Licenses, Recruiting, Training, etc.)

For Year to Date, March 2023:

Variance of **\$9,562k** due to:

\$2,092k UBC Resources

- additions **\$(212)k** - SADR (PCR2/PCR103)
- timing **\$(1,398)k** - accrued vacation liability
- timing **\$3,702k** - delayed hiring

\$7,470k Other Costs

- savings **\$1,074k** - FERIC lease; licenses
- additions **\$(21)k** - Comm. Support (PCR57)
- timing **\$6,417k** - various (Interdependent projects, Licenses, Recruiting, Training, etc.)

Annual Forecast for FY22/23:

Variance of **\$9,562k** due to:

\$2,092k UBC Resources

- additions **\$(212)k** - SADR (PCR2/PCR103)
- timing **\$(1,398)k** - accrued vacation liability
- timing **\$3,702k** - delayed hiring

\$7,470k Other Costs

- savings **\$1,074k** - FERIC lease; licenses
- additions **\$(21)k** - Comm. Support (PCR57)
- timing **\$6,417k** - various (Interdependent projects, Licenses, Recruiting, Training, etc.)

Overall Program:

Variance of **\$(10,000)k** due to:

\$(10,000)k Other Costs

- additions **\$(10,000)k** - Comm. Support (PCR57)

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 April 7, 2023

The positive FY22/23 variances in UBC Resources and Other Costs are timing and 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.



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](#)