



SUBJECT	Integrated Renewal Program (IRP) Student – Update and Program Change Request
SUBMITTED TO	Finance Committee
MEETING DATE	November 20, 2023
SESSION CLASSIFICATION	Recommended session criteria from Board Meetings Policy: OPEN
REQUEST	APPROVAL REQUESTED IT IS HEREBY RESOLVED that the Finance Committee recommends the Board of Governors grant approval for a release of up to \$55 million from the IRP Student contingency reserve for the purpose of funding the IRP Student Completion Program.
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 & Integrated Services 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 Shelly Morrison, Senior Director, Financial Services & Strategic Procurement 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 [September 14, 2023](#) 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.

Launch 1 of Workday Student went live on October 4, 2023. The first phase of implementation impacts a relatively small number of staff and Hypercare support is in full swing. Milestone 8 was completed with a combined Pass/Conditional Pass rate of 92%.

Scope and Resources are reporting on track (green) on the Status Report. Schedule shifted to “At Risk” leading up to Launch 1 as the team navigates the large volume of work. Overall, the Program Health indicator shows IRP Student “At Risk” but holding.

The third IRP Student Pulse Survey was completed in August 2023 and indicates the team is doing well overall. Results continue to be consistent across the previous surveys and the next edition is scheduled for January 2024.

An Institutional Readiness Double Down was implemented for Launch 1 of Workday Student. The team successfully worked alongside business stakeholders to ensure impacted areas were prepared for the transition. The team continues to support any outstanding Launch 1 activities, while the focus shifts to Launch 2.

Hypercare for Launch 1 is underway, with daily meetings to identify and address raised issues or concerns. A Code- C (Critical) Protocol has been established to address critical system issues. The Transition to Operations (TOPs) work continues and includes finalizing the Workforce Transition Rollout Plan. TOPs work is being closely monitored and updates will be shared with the Program team shortly.

On July 20th the IRP Student program received approval for a Conditional Go to implement Workday Student. The Go Decision received unanimous endorsement throughout the governance process. Deadlines were set for both Launch 1 and Launch 2 conditions, with check ins scheduled for August 30, September 30, and November 30. The program team successfully met six of the 8 conditions for L1. A contingency plan was approved for the 2 outstanding Learner Financial Support (LFS) conditions and LFS was moved to Launch 2 as the first use by the Business is not until 2024. The Business Owner, Registrar, is comfortable with the later go live. Conditions for Launch 2 continue and remain on track.

A year-to-date Financial Summary has been included for visibility.

Based on lessons learned from Workday HR/Finance Release 1 it is evident that for UBC to fully realize the benefits and value of our investment in Workday Student a second phase of the program is also required to complete the original scope of work. A proposal for the Student Completion project has been endorsed by IRP Student governance and is detailed below.

APPENDICES

1. Program Status Report including:
 - Milestone 8 Results
 - Pulse Survey August 2023 Results
 - Institutional Readiness
 - Hypercare
 - Workforce Transition
 - Go Conditions Update
 - Financial Summary
 - Student Completion Endorsement
 - Next Steps

PRESENTATIONS

1. IRP Student Update

PROGRAM STATUS:

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. The Program Health is listed as "At Risk", but holding steady. Schedule remains extremely tight, but transitioned to "At Risk" and holding leading up to Launch 1 which occurred on October 4, 2023.

At this time Scope continues to be on track. Schedule remains at risk, but shifted to "At Risk" in the lead up to Launch 1. Launch 1 of Workday Student successfully went live on October 4 and Hypercare support began October 5 with daily huddles to ensure issues are triaged and addressed in a timely manner. Milestone 8 was completed successfully and a Launch 1 retrospective took place in early October. Go Conditions for Launch 2 continue on track and the current focus for the Program remains Institutional Readiness (IR) for Launch 2, the Transition to Operations (TOPs), and the approved contingency plan and revised solution for Learner Financial Support (LFS).

Resources are showing as green, with a downward trend, based on a slightly increased attrition rate. The hire completion rate for the program is at nearly 100% with approximately 8% of the team hired as contractors. Wave 3 hiring includes a large number of student Learning Rovers planned for late-2023. 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. The HR focus remains on 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. Pulse Survey results indicate teams are balancing large workloads and deadlines, but overall are managing well.

IRP STUDENT PROGRAM STATUS

PREPARED BY IRP PMO, PERIOD ENDING WEDNESDAY OCT 25, 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"> QA <ul style="list-style-type: none"> Preparing for next round of L2 E2E tenant validation and L2 performance testing TOPS: <ul style="list-style-type: none"> Workforce Transition Plan Process and toolkits with managers has commenced Follow-up Workshops on Sustainment occurred on Oct 23rd – 25th LFS <ul style="list-style-type: none"> Completion of deep dive sessions to inform effort estimation and timeline Received unanimous endorsement from ITAC for Student 2.0 proposal TCM alignment based on the success of Institutional Readiness double down and team feedback well received 	<ul style="list-style-type: none"> Institutional Readiness: <ul style="list-style-type: none"> Develop & sign off part 2 of the Training plans (Build Expertise) for priority 1 + 2 areas Planning SCH AUT sessions in November Change bundles for L2 areas TOPS: <ul style="list-style-type: none"> Workforce Transition Manager Orientation Sessions continue Target for Executive decision on sustainment plan set for Oct 27th LFS: <ul style="list-style-type: none"> Kick-off with business owners planned for Nov 6 Cutover <ul style="list-style-type: none"> Communicate proposed changes to all participants by Friday October 27th, 2023 Launch 2 Kick off and orientation in progress IRP Student In-Person Launch 1 Celebration scheduled for Oct 26th
Top Focus	Launch 1 Hypercare Status
<p>Go Decision Conditions for November 30th</p> <p>Launch 2: 8 conditions are on track; 1 condition complete</p>	<ul style="list-style-type: none"> ADM: 3114 undergrad and 1967 grad applications successfully ingested Support tickets received 164, tickets resolved 91 Two Admissions issues have been raised to Critical priority, and teams are working to resolve throughout the weekend. <ul style="list-style-type: none"> Bulk communications cannot yet be sent to undergrad applicants Sauder grad students unable to accept offers/pay deposits

Top Risks and Issues

Issue Heat Map

		URGENCY				
		1 - Low	2 - Medium	3 - High	4 - Critical	Total
IMPACT	4 - Critical	1	1	4	1	7
	3 - High	1	1	4	1	7
	2 - Medium	1	1	1	1	4
	1 - Low	1	1	1	1	4
Total		4	4	10	4	22

New Issues: +1 Closed Issues: 0 In-active: 0

New Very High Score Issue: None

Risk Heat Map - After Mitigation*

		Residual Probability				
		1 - Unlikely	2 - Possible	3 - Likely	4 - Almost Certain	Total
Residual Impact	4 - Critical	1	1	2	1	5
	3 - High	1	2	2	1	6
	2 - Medium	1	12	2	1	16
	1 - Low	33	13	3	1	50
Total		36	28	7	4	75

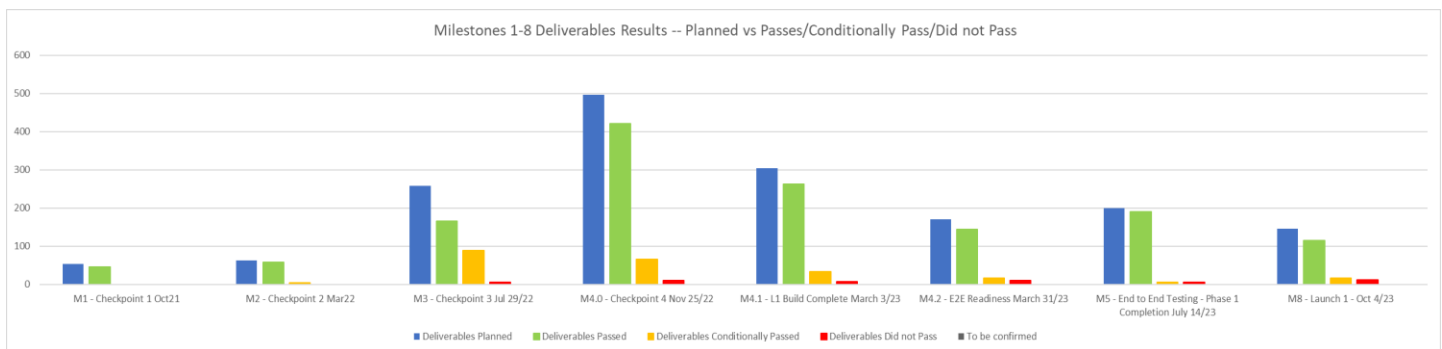
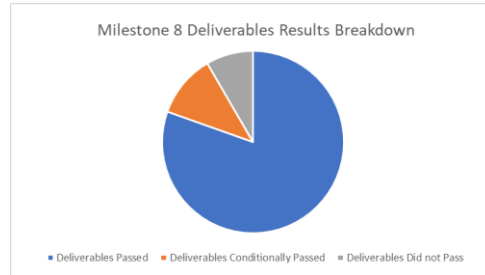
New Risks 0 | Response Plans Executed +1 | Risk Realized -1
No Longer a Risk 0 | Draft - 1

New Very High Score Risk Before Mitigation: None

* Includes Mitigated and Accepted risks

MILESTONE 8 RESULTS:

The final results have been validated for Milestone 8. The Program achieved a 92% completion rate when combining the Pass and Conditional Pass items.



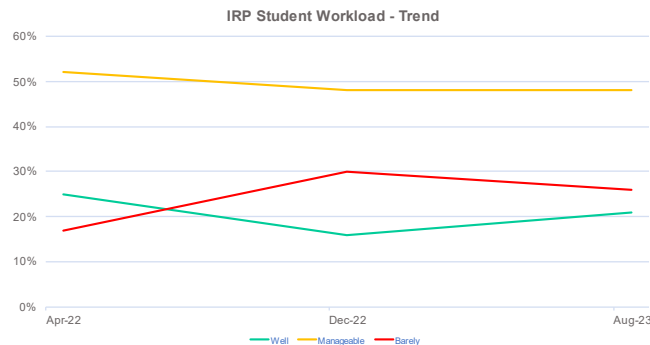
A total of 87 deliverables were moved within or outside of Milestone 8. Of the 87 items, 58 were moved outside of M8, 21 of those were deemed “Critical” and 37 were “Non-Critical”. Items moved are tracked and reported in the weekly Program Status Report.

PULSE SURVEY RESULTS:

The IRP Student team has been hard at work during this time, and it was important to leadership to check in with the team. IRP Student completed the third iteration of the team Pulse Survey in August. The previous two surveys took place in April and December of 2022. The program continued to have a very strong response rate across the team. The August 2023 survey received 374 responses, approximately 89% of the IRP Student team. The overall results of the survey were quite positive, and highlight that the team is managing their workload, and feeling engaged and supported by their manager and senior leadership team. Trends suggest stability and consistency throughout the Program with small variances of 2-5% in most categories.

Pulse Survey Aug 2023 –Workload

Are you successfully managing your workload?



Integrated Renewal Program - Student

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Responses were also broken down by individual workstreams to better understand specific areas and their need for support. Notably there was a dip in satisfaction and engagement in the Transformation & Change Management team. This was expected as the team recently went through a number of management changes due to illness/personal leave and some changes in structure in relation to the Institutional Readiness (IR) Double Down. We are happy to announce a new Director of Transformation & Change Management started in early October, and lessons learned from the Institutional Readiness Double Down provided solid feedback for the Institutional Readiness plan for Launch 2. The Program will do another Pulse Survey check in in January 2024, as staff will be ramping up for Launch 2 in February. IRP Student is a strong and dedicated team that care deeply about UBC's success.

READINESS:

INSTITUTIONAL READINESS DOUBLE DOWN

As we approached the initial launch of Workday Student, the focus transitioned from the technical build to preparing and training the UBC community. For the Workday Student implementation to be successful it is imperative that faculties, units, and students are prepared for the coming changes. The Program's mission is to provide support and partnership to our most impacted business stakeholders to ensure a successful Launch and Hypercare period.

To achieve this IRP Student fully aligned and anchored plans and approaches around the Academic Cycle. This included sequencing Launch 1 work based on priority, and when those capabilities were required. To do this the Program worked with business stakeholders to determine prioritization, and partnered alongside business owners. At a program level resource optimization remains key, the movement of resources to high priority areas to execute work in a timely manner.

As Launch 2 approaches the Institutional Readiness scope includes continued support for Launch 1 capabilities, while establishing a process promoting active participation and feedback from business owners. Training will continue at pace and focus area leads will facilitate and support their teams to achieve our readiness objectives.

Additional scope for Launch 2 Institutional Readiness includes:

- In scope:
 - Remaining L1 Training for Admissions, Scheduling and Curriculum
 - L2 functions for ADM, R&A, LFM
 - Approach and Artifacts of training
 - BP Packages/Change Bundles
 - Student Training
 - Mock Term
 - Community Testing Objectives and alignment with IR

Next steps for the Institutional Readiness (IR) work includes further engagement with Enrolment Services and incorporating lessons learned from the Launch 1 IR Retrospective. For the second launch there will be greater focus on communicating and socializing the Launch 2 timeline by our Change & Engagement Partners (CEPs) and the IRP Student website will post regular updates on training content available for the community. The IR team will continue to develop the project plan and review resourcing needs as they progress. Based on feedback the approach to Community Testing and the Mock Term will be adjusted to better engage the community. All recommendations regarding strategy and approach will be vetted through the Steering Committee for feedback and approval.

HYPERCARE:

As noted above, Workday Student – Launch 1 Hypercare began October 5, 2023. Launch 1 included Admissions (used for 2024W Admissions), Course Scheduling (used for 2024W course scheduling), and Curriculum Management (used for 2024 – 25 curriculum changes). The new capabilities primarily impact Enrolment Services staff and staff in faculties or departments that support course scheduling.

Launch 1 has been deemed successful, with over 3100 undergraduate admission applications received via Education Planner BC (EPBC), and approximately 2000 Grad applications successfully ingested as of October 27.

The Hypercare Coordination Committee (HCC) meets daily to review critical issues and to ensure things are running smoothly. Program leadership meets weekly to review critical and/or high ranked issues to guide the HCC's response. The ticketing system, ServiceNow is working well with users submitting tickets, which are then triaged and addressed or escalated if necessary. Ticket trends show access requests/issues, data quality (missing PUIDs – Person Unique Identifier), and integration issues are the main concerns. Since Go-Live the team has received 491 tickets, of which 277 have been closed. To quickly address identified critical issues a Hypercare Code-C (Critical) Protocol has been established. The

Code-C protocol has been applied to two critical issues, one of which is resolved, and the other is in the process of being resolved.

HIGHLIGHTS (Cumulative since Oct 4)

- ❑ 3114 undergrad applications successfully ingested
- ❑ 1967 Grad applications successfully ingested from XAMS (non-ADMS/EDUC process areas)

UPCOMING BUSINESS EVENTS

- ❑ Re-admissions/change of program applications opened
- ❑ Admissions staff begin acknowledging applications
- ❑ Scheduling – Scientia/BPMS/WD - rollout to production Oct 27 – Nov 1st

COMMUNITY FEEDBACK

- ❑ Access issues – # of requests and length of time to provision (see update on next page)
- ❑ 249 visits to IRP Student Launch 1 website since Oct. 4
- ❑ New training materials released based on feedback
- ❑ Bi-weekly meetings with Grad and Undergrad stakeholders to discuss any L1 training gaps

LAUNCH 1 SUPPORT ISSUES/UPDATES

- ❑ Website being updated to include 'known issues'
- ❑ Hypercare Code-C (Critical) Protocol established
- ❑ Critical issues identified in Admissions; Code-C protocol applied.
 - Bulk communications could not be sent to undergrad students. **Status:** Resolved.
 - Sauder grad students experiencing issues with payment / offer acceptance. **Status:** Syncing issue resolved; one outstanding

SERVICENOW METRICS

Incident Count:
Currently Open
214

Incident Count:
Count to Date
491

Incidents Open:
Last 7 days
191

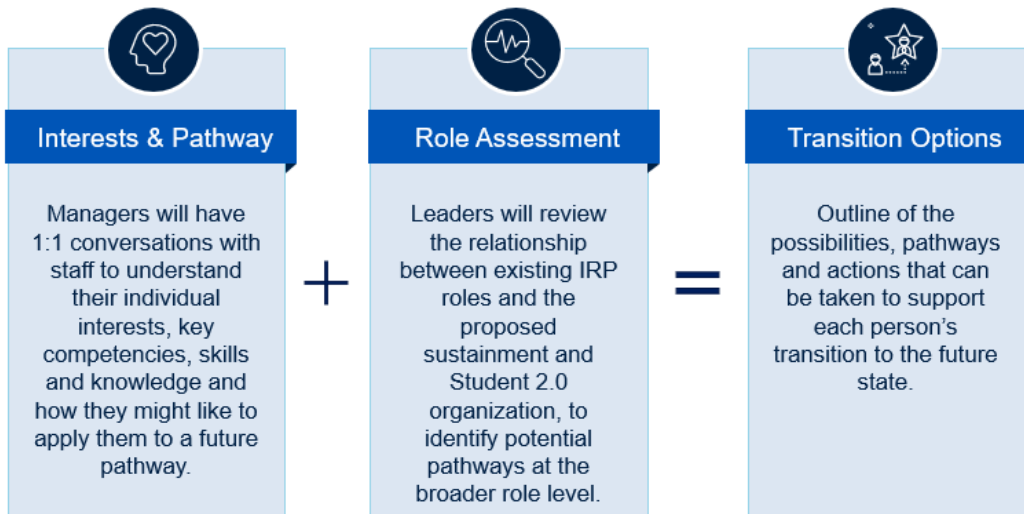
Incidents
Resolved:
Last 7 days
91

WORKFORCE TRANSITION:

As IRP Student approaches the final year of the Program, employees of the Program will be receiving letters of working notice as per the AAPS requirements. The IRP Student team is a strong team with significant and specific skill sets that are an asset to the university. To retain this knowledge conversations will be had with the team around employment opportunities available after or in support of IRP Student, this process is referred to as Workforce Transition.

Workforce Transition conversations create space for employees to connect with their managers to discuss interests and opportunities available to them at UBC. Managers have received orientation sessions to prepare them to work with staff to develop their transition plans. Transition plans will be individualized and informed by two components, interests and pathways and role assessment. Managers will have 1:1 conversations with staff to understand their individual interests, key competencies, skills and knowledge and how they might like to apply them to a future pathway. Leaders will then review the relationship between existing IRP roles and the proposed sustainment and Student Completion organization to identify potential pathways at the broader role level.

Conversations will begin with staff in November and carry through till late January 2024. The first wave of hiring for Workday Student Sustainment are expected to be posted in early December, with subsequent postings occurring through mid 2024.



SOLUTION UPDATES:

UPDATE ON GO DECISION CONDITIONS:

On July 20, IRP Student received approval from UBC's Interim President and Vice-Chancellor to proceed with a conditional Go. A conditional Go, is a Go decision with explicit conditions that must be met, including transparency around the critical work that needs to be done ahead of each Launch. IRP Student has three condition check-in meetings with Executive Sponsors to ensure the program remains on track. The check in for Launch 1 (October 4, 2023) was held on August 30 and check ins for Launch 2 (February 2024) are September 30 and November 30.

Go Condition Status:

- Completed 6 conditions for Aug 30
- Completed 1 condition early for Sep 30
- Completed 1 condition early for Nov 30
- Contingency plan approved for Learner Financial Support

Of the 8 conditions due for August 30th, 6 conditions were completed. The remaining items, LFS and Deloitte included contingency plans that were vetted and deemed acceptable to the impacted business owners. This plan involved moving the due date for these two LFS conditions to Sept 30th which aligned them with another similar Launch 2 condition. In early October the contingency plan for Learner Financial Support was approved with work beginning right away. Since the first use of LFS by the Business is not until 2024, the Business Owner (Registrar) was comfortable with a later go live for LFS. IRP Student will continue to work closely with the business owners to ensure business continuity.

Remaining conditions for Launch 2 are on track and if all conditions are met by the end of November, IRP Student will proceed as planned with Launch 2 of Workday Student.

GO DECISION CRITERIA CONDITIONS DASHBOARD

PREPARED BY IRP PMO, PERIOD ENDING WEDNESDAY OCTOBER 4, 2023

LEGEND: Status Indicator Change

  →

Previous Report → Current Report

> **Legend** G GO ✔ On Track ⚠ At Risk ● Completed

Student Solution*		Status	Technical Delivery		Status	Ecosystem Applications		Status	Security, Access, Data and Reporting		Status
Admissions		G	Environment Management		G	Integration Testing		G	Security, Access and Integration		G
Assessment Outcomes		●	Person Hub		G	Data sent to Client		G	IRP Student Security		G
Curriculum Management		●	Common Services		G	Client Validation Received		G			
Enrolment		●				Critical Development Completed		G			
Graduation		G				Non-Critical Plan Completed		G			
Learner Financial Management		●									
Learner Financial Support		TBA**									
Learner Management		✔	Partner Readiness		Status	Transformation and Change Management		Status	Transition to Operations		Status
Progression		✔	Workday		G	Institutional Readiness		G	Service Delivery		G
Registration		G	Deloitte		TBA**	Transition Plans		G	Change Management		G
Scheduling		✔	Touchnet		G	Advanced User Training		G	Financial		G
SIS Transition		G				Core Training		G	People		G
Transfer Credit		●							Technology		G
									Change Management – Hypercare Plan		G
									Change Management – Rollout and Change Plan		G

*The table above includes E2E testing of:

- Configurations
- Development
- Integrations
- Data Conversion
- Reports
- Security

**To be Adjusted – Pivoting to the agreed backup plan

If a Launch 2 condition has not been met by the specified date, a backup plan will be triggered. In the event of a showstopper (an item that due to the nature or volume would cause major disruption to the university or great reputational risk) arises with the backup plan, the showstopper contingency in the Cutover plan would be triggered. Cutover Plans have contingencies built in, in the event of an unanticipated showstopper.

IRP Student remains on track based on the current timeline, and will continue to monitor and report progress beyond Launch 1 and in preparation for Launch 2.

Majority of Launch 2 conditions must be completed by November 30, 2023, however specific Launch 2 conditions have earlier dates due to business considerations. If a Launch 2 condition has not been met by the specified date, a backup plan will be triggered. In the event of a showstopper (an item that due to the nature or volume would cause major disruption to the university or great reputational risk) arises with the backup plan, the showstopper contingency in the Cutover plan would be triggered.

IRP Student remains on track, based on the current timeline, and will continue to monitor and report progress beyond Launch 1 and in preparation for Launch 2.

FINANCIALS:

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.

For Year to Date, as of September 2023 there is a variance of (\$1,019k). The variance is due to additional UBC resources (\$262k) and timing \$591k. There was also a (\$47k) timing variance related to Prime Consultants, Workday for boomerangs to address Graduation requirements, and (\$710k) in Other Costs. Other costs include licenses and tools, the Learner Financial Support Point Solution, training, interdependent projects, premise costs, first year sustainment, and other non-labour items.

Overall, the IRP Student Program expects a variance of (\$10,000k) due to Community Support Funding, however funds from the contingency fund have been approved for those costs.

FINANCIAL REPORT FY23/24 – EXECUTIVE SUMMARY

(in thousands)

	For the month of Sep-2023			Year-To-Date Sep-2023			Annual FY 2023/24			Overall Program ¹		
	Actual	Budget	Variance	Actual	Budget	Variance	Actual	Budget	Variance	Forecast	Budget	Variance
UBC Resource Costs	4,618	4,771	153	29,018	28,756	(262)	57,733	57,209	(524)	149,757	149,757	-
External Prime Consultants	-	-	-	1,845	1,798	(47)	3,643	3,596	(47)	13,551	13,551	-
Other Costs	(1,645)	(1,847)	(201)	2,788	2,079	(710)	20,231	17,693	(2,538)	53,618	43,618	(10,000)
Total expenses before contingency	2,973	2,925	(49)	33,651	32,632	(1,019)	81,607	78,498	(3,108)	216,926	206,926	(10,000)
Contingency - approved allocation	-	-	-	-	-	-	-	4,243	4,243	-	10,000	10,000
Contingency Remaining	-	-	-	-	-	-	-	25,347	25,347	-	68,000	68,000
Total after Contingency	2,973	2,925	(49)	33,651	32,632	(1,019)	81,607	108,088	26,481	216,926	284,926	68,000

Variance analysis:

For the month of September 2023:

Variance of **\$(49)k** due to:

\$153k UBC Resources

- additions **\$(156)k** - SADR (PCR2/103/499)
- timing **\$309k** - various

\$0k Prime Consultants

\$(201)k Other Costs

- additions **\$(209)k** - Comm. Support (PCR57)
- savings **\$43k** - Lease
- timing **\$(35)k** - Interdep. projects (TC)

For Year to Date, September 2023:

Variance of **\$(1,019)k** due to:

\$(262)k UBC Resources

- additions **\$(853)k** - SADR (PCR2/103/499)
- timing **\$591k** - various

\$(47)k Prime Consultants

- timing **\$(47)k** - Workday - Boomerangs for
Graduation requirements

\$(710)k Other Costs

- additions **\$(525)k** - Comm. Support (PCR57)
- savings **\$263k** - Lease; Interdep. projects
- timing **\$(448)k** - various; Interdep. Projects (TC)

Annual Forecast for FY23/24:

Variance of **\$(3,108)k** due to:

\$(524)k UBC Resources

- additions **\$(1,765)k** - SADR (PCR2/103/499)
- timing **\$1,241k** - various

\$(47)k Prime Consultants

- timing **\$(47)k** - Workday - Boomerangs for
Graduation requirements

\$(2,538)k Other Costs

- additions **\$(2,979)k** - Comm. Support (PCR57)
- savings **\$501k** - Lease; Interdep. projects
- timing **\$(60)k** - various (Inter. Projects
(SS/TC); Workday subscription credit)

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 October 6, 2023

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

STUDENT COMPLETION PROJECT:

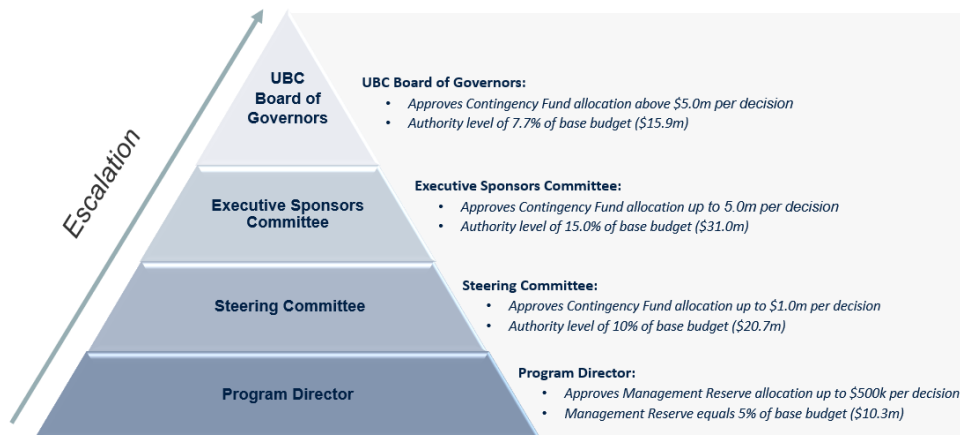
To ensure UBC receives full benefit of the Workday Student implementation IRP Student leadership is proposing a Student Completion Project be approved to begin once IRP Student stands down in November 2024. The proposal includes six areas of focus, or Work Packages (five scope areas + infrastructure) and would last for 28 months, starting in December 2024. The Completion Project addresses the original approved scope for IRP Student, some of which was deferred due to the maturity of the Workday product. Leadership utilized lessons learned from the Workday HR and Finance implementation and based this proposal on the R1 completion work that was necessary to maximize system functionality.

IRP Student would like to leverage the momentum of the current work and retain key resources for the next phase. It is also an opportunity to maintain the strong partnership UBC has built with Workday as a strategic early adopter. This creates a number of business benefits including expediting the implementation of critical and major gaps and provides time for gradual and thoughtful transition of critical Academic Foundation work to ongoing sustainment through the maturing product and knowledge transfer. The Student Completion project would leverage the current Program and Integrated Governance that is already established and effective. IRP Student is proposing a Program Change Request (PCR) to fund the Completion of IRP Student for up to a total amount \$55 million from the Program’s Contingency Reserve.

6 Work Packages (5 scope areas + infrastructure) over 28 months, starting in Dec 2024

Cleanup/Completion	Workday Student Product Releases Catchup	Workday Student Critical/Major gaps	LFS - Automation Originally in Scope	Academic Foundation - Transition to Sustainment	Infrastructure Requirements
<p>Cleanup/completion critical Workday Student Systems</p> <ul style="list-style-type: none"> Ad-Hoc Comms Official Documents Historic Student Record Management Final Grades and Class Comms <p>Appian</p> <p>Student Solution Team – 8 FTEs</p> <p>TECH, SADR and QA effort</p> <p>Moderate TCM impact</p>	<p>Catchup on 4 product releases that UBC would be behind due to current focus on blocker gaps uptake only</p> <p>WD STU only</p> <p>Student Solution Team – 5 FTEs</p> <p>Some QA and TCM as needed</p> <p>Minimal to no impact on SA, TECH and SADR</p>	<ul style="list-style-type: none"> Mass actions functionality Advising Registration and Learner Profile gaps Academic Advising Student Financials Final Grades and Class Comms <p>WD STU only</p> <p>Student Solution Team – 12 FTEs</p> <p>Some QA, TECH, SADR Reporting and TCM effort</p>	<p>Completion of original LFS scope beyond current state</p> <p>Appian</p> <p>Student Solution Team – 5 FTEs</p> <p>TECH, QA and TCM effort</p> <p>Moderate impact on SADR Data Conversion</p>	<p>Support and transition to ongoing sustainment for all curricular data in Workday Student</p> <p>WD STU only</p> <p>Student Solution Team – 10 FTEs</p> <p>Minimal QA effort</p> <p>Minimal to no impact on SA, TECH, SADR and TCM</p> <p>Detailed Planning to include ES, ISC, and UBC IT</p>	<p>Stabilization of critical Workday Student Systems</p> <p>PHUB, EDG, IAM, Privacy And Security</p> <p>Teams SA TECH, QA</p> <p>Moderate WD STU and SADR</p> <p>Approach to Include Preliminary Planning for Decommissioning SIS</p>

Contingency and Management Reserve authority levels proposed for the Student Completion project mimic that of IRP Student.



The IRP Steering Committee and Executive Sponsors both endorsed the Student Completion proposal. The team also received a unanimous endorsement from the Information Technology Advisory Council (ITAC) in October. IRP Student is requesting endorsement from the Finance Committee and a recommendation to the Board of Governors to approve the Student Completion project Program Change Request.

IT IS HEREBY RESOLVED that the Finance Committee recommends the Board of Governors grant approval for a release of up to \$55 million from the IRP Student contingency reserve for the purpose of funding the IRP Student Completion Program.

NEXT STEPS:

The IRP Student team remains hard at work meeting milestones and deadlines. The focus has shifted to resolving remaining Launch 2 Go Decision conditions, and Institutional Readiness across UBC. The detailed Cutover plan for Launch 2 continues to be refined. Hypercare support continues and the next phase of Workforce Transition is underway. Schedule remains tight, but the Program team remains 100% committed to the successful delivery of the IRP Student Consolidated Plan on the current timeline.



IRP Student Update

Finance Committee

November 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

Jennifer Burns, Chief Information Officer and AVP Information Technology

Dr. Joanne Fox, Principal, UBC Vantage College

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

IRP Student - For INFORMATION and ENDORSEMENT

- Program Status
 - Status report
 - Milestone 8 Results
 - Pulse Survey August 2023 Results
- Readiness
 - Institutional Readiness
 - Hypercare
 - Workforce Transition
- Solution Status
 - Go Conditions Update
 - Financial Summary
 - Student Completion Endorsement

Program Status

Status Report

IRP STUDENT PROGRAM STATUS

PREPARED BY IRP PMO, PERIOD ENDING WEDNESDAY OCT 25, 2023

Program Health Overall:

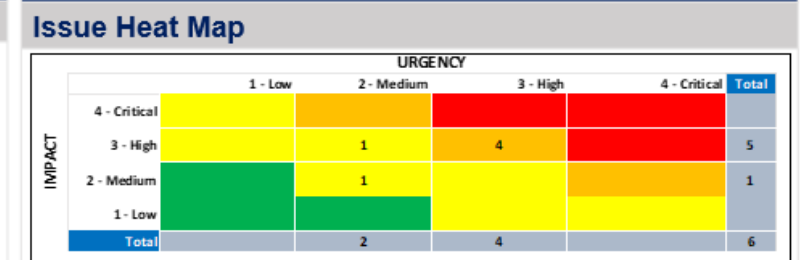
Scope: Resources: Schedule:

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"> QA <ul style="list-style-type: none"> Preparing for next round of L2 E2E tenant validation and L2 performance testing TOPS: <ul style="list-style-type: none"> Workforce Transition Plan Process and toolkits with managers has commenced Follow-up Workshops on Sustainment occurred on Oct 23rd – 25th LFS <ul style="list-style-type: none"> Completion of deep dive sessions to inform effort estimation and timeline Received unanimous endorsement from ITAC for Student 2.0 proposal TCM alignment based on the success of Institutional Readiness double down and team feedback well received 	<ul style="list-style-type: none"> Institutional Readiness: <ul style="list-style-type: none"> Develop & sign off part 2 of the Training plans (Build Expertise) for priority 1 + 2 areas Planning SCH AUT sessions in November Change bundles for L2 areas TOPS: <ul style="list-style-type: none"> Workforce Transition Manager Orientation Sessions continue Target for Executive decision on sustainment plan set for Oct 27th LFS: <ul style="list-style-type: none"> Kick-off with business owners planned for Nov 6 Cutover <ul style="list-style-type: none"> Communicate proposed changes to all participants by Friday October 27th, 2023 Launch 2 Kick off and orientation in progress IRP Student In-Person Launch 1 Celebration scheduled for Oct 26th

Top Focus	Launch 1 Hypercare Status
<p>Go Decision Conditions for November 30th</p> <p>Launch 2: 8 conditions are on track; 1 condition complete</p>	<ul style="list-style-type: none"> ADM: 3114 undergrad and 1967 grad applications successfully ingested Support tickets received 164, tickets resolved 91 Two Admissions issues have been raised to Critical priority, and teams are working to resolve throughout the weekend. <ul style="list-style-type: none"> Bulk communications cannot yet be sent to undergrad applicants Sauder grad students unable to accept offers/pay deposits

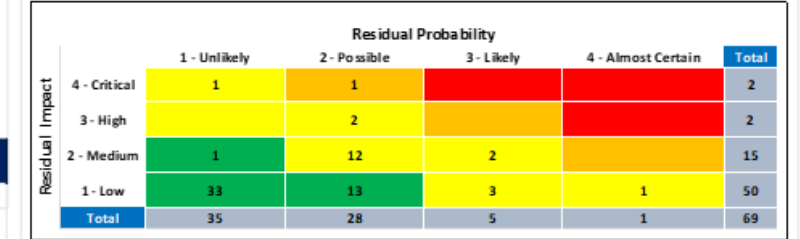
Top Risks and Issues



New Issues: +1 Closed Issues: 0 In-active: 0

New Very High Score Issue: None

Risk Heat Map - After Mitigation*



New Risks 0 | Response Plans Executed +1 | Risk Realized -1
No Longer a Risk 0 | Draft - 1

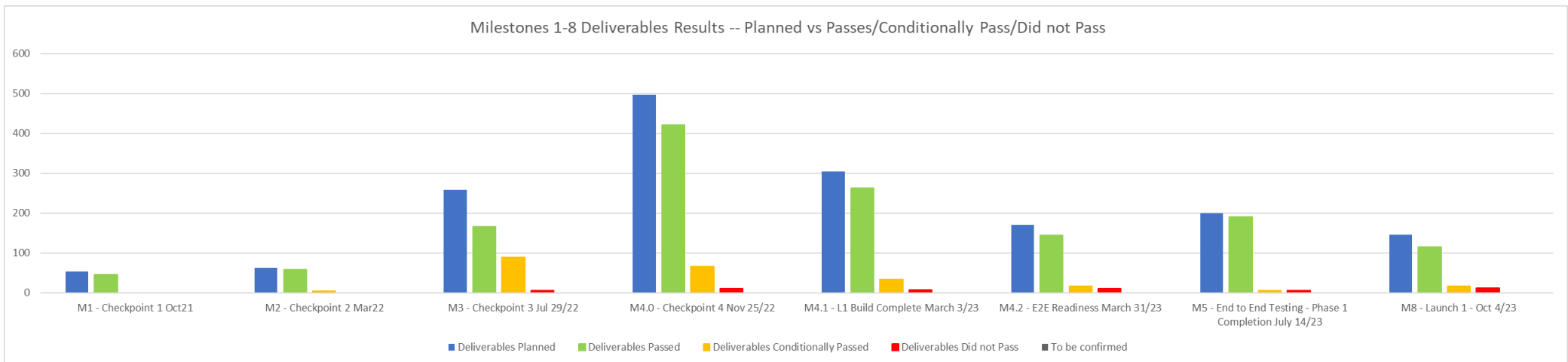
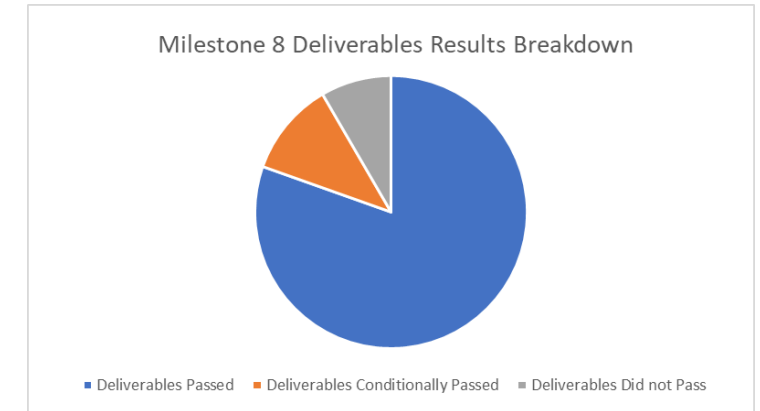
New Very High Score Risk Before Mitigation: None

* Includes Mitigated and Accepted risks

IRP Student Milestone 8 Results

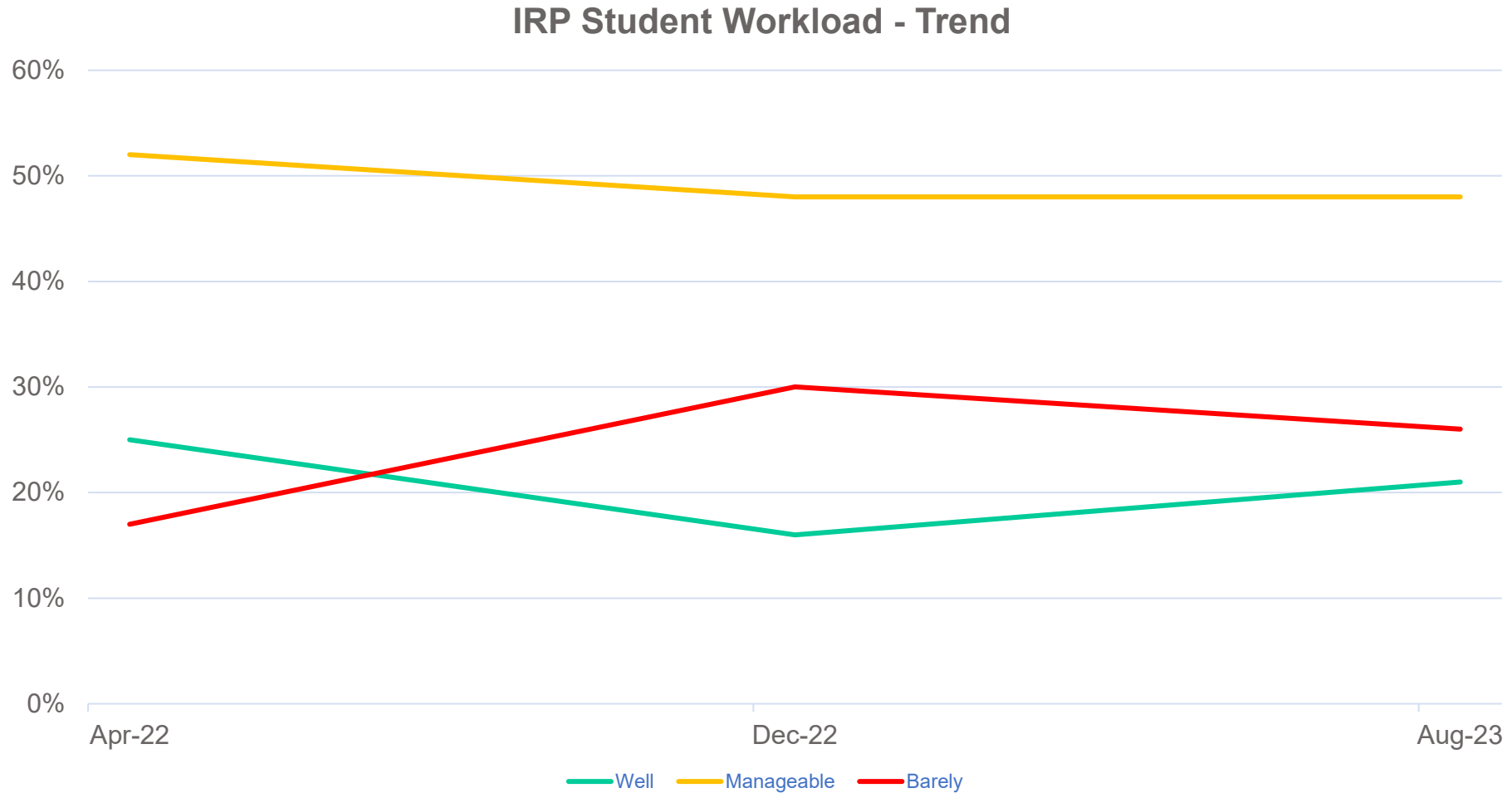
Milestone 8 completion information:

- The final results have been compiled and validated
- The results indicate that the Program achieved 92% completion when combining the Pass and Conditional Pass items
- Reports have been finalized to confirm the amount of movement within and outside of Milestone 8



Pulse Survey Aug 2023 – Workload

Are you successfully managing your workload?



Readiness

Institutional Readiness Launch 1

Our mission was to provide most impacted business stakeholders with as much support and deep partnership possible to support a successful Launch 1

- **Mitigation Strategies:**
 - Fully aligned with and anchored on the Academic cycle
 - Sequenced Launch 1 work – based on when capabilities will be needed in the academic cycle
 - Prioritized work that resonates with business stakeholders
 - Close partnership and co-creation with business owners
 - Resource optimization – movement of resources to high priority areas
 - Process change – increased speed of delivery
- **IRP Student Going Forward:**
 - Priority on capabilities needed soonest
 - Incorporate feedback from business owners, and invite their ongoing active participation
 - Ensure training continues at pace
 - Similar to the Quality Assurance double down, team and focus area leads continue to play their role of facilitating and supporting their teams to achieve our objectives

Institutional Readiness Launch 2

- Retrospective on L1 IR with Enrolment Services completed and incorporated into L2 IR Planning
- Focus on communication of L2 timeline for awareness and socialization
- IRP Student website updates on training content
- Continued development of detailed project plan and resourcing review
- Adjust community testing and mock term based on lessons learned from L1
 - Recommendations on strategy/approach presented and approved by IRP Student Steering Committee
- Finalization and mobilization of L2 IR activities

Workday Student Hypercare Summary: Oct 23 - 27

HIGHLIGHTS (Cumulative since Oct 4)

- ❑ 3114 undergrad applications successfully ingested
- ❑ 1967 Grad applications successfully ingested from XAMS (non-ADMS/EDUC process areas)

UPCOMING BUSINESS EVENTS

- ❑ Re-admissions/change of program applications opened
- ❑ Admissions staff begin acknowledging applications
- ❑ Scheduling – Scientia/BPMS/WD - rollout to production
Oct 27 – Nov 1st

COMMUNITY FEEDBACK

- ❑ Access issues – # of requests and length of time to provision (see update on next page)
- ❑ 249 visits to IRP Student Launch 1 website since Oct. 4
- ❑ New training materials released based on feedback
- ❑ Bi-weekly meetings with Grad and Undergrad stakeholders to discuss any L1 training gaps

LAUNCH 1 SUPPORT ISSUES/UPDATES

- ❑ Website being updated to include 'known issues'
- ❑ Hypercare Code-C (Critical) Protocol established
- ❑ Critical issues identified in Admissions; Code-C protocol applied.
 - Bulk communications could not be sent to undergrad students. **Status:** Resolved.
 - Sauder grad students experiencing issues with payment / offer acceptance. **Status:** Syncing issue resolved; one outstanding

SERVICENOW METRICS

Incident Count:
Currently Open

214

Incident Count:
Count to Date

491

Incidents Open:
Last 7 days

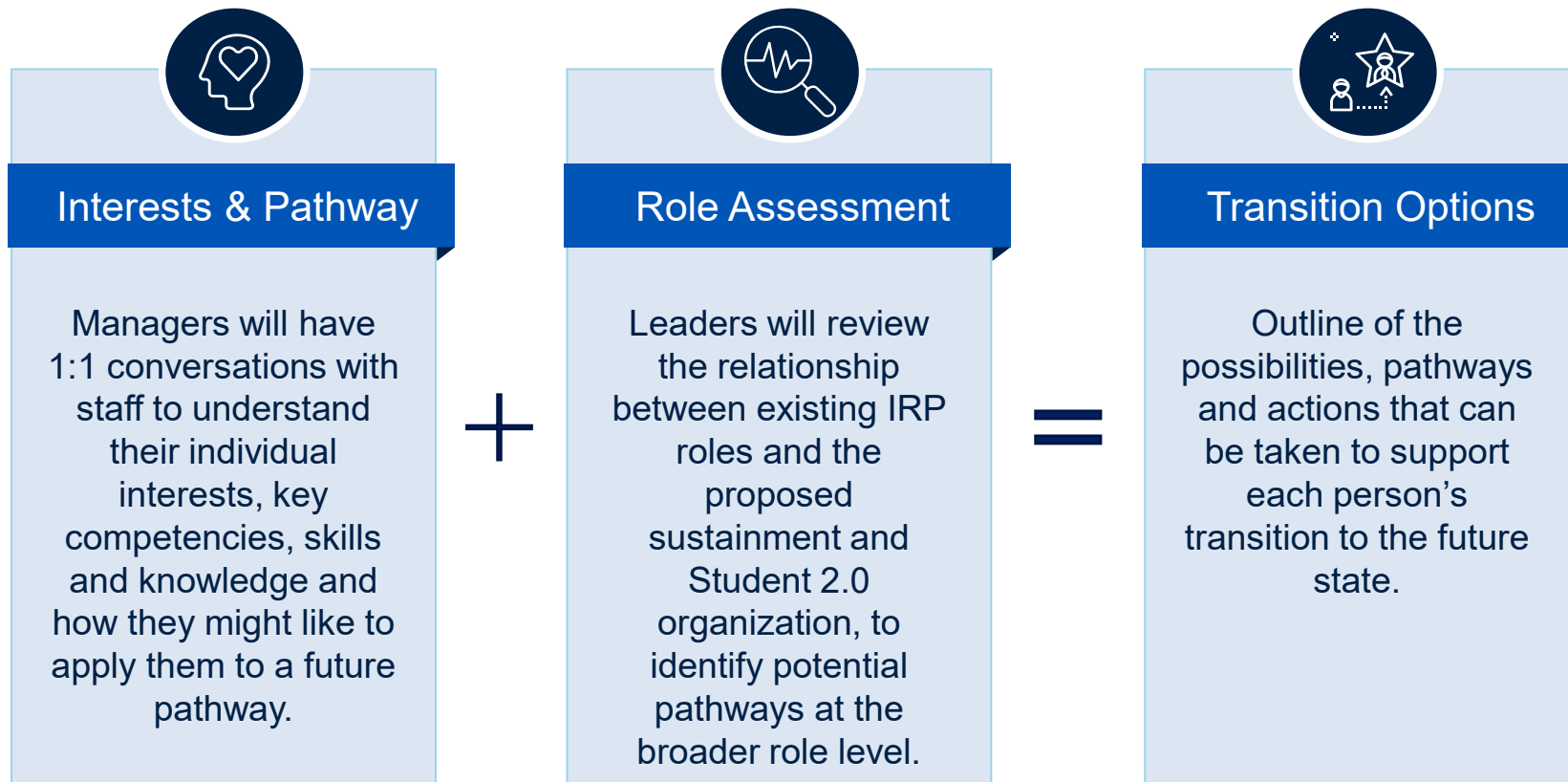
191

Incidents
Resolved:
Last 7 days

91

Workforce Transition

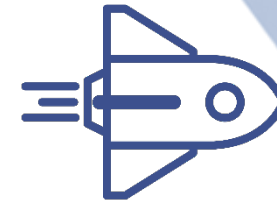
Orientation sessions for managers have been completed and they will be scheduling transition plan 1:1s with their teams. An Employee Toolkit is now available.



Solution Status

IRP Student Program went Live with

Launch 1 of Workday Student on October 4, 2023



Per UBC's Interim President and Vice-Chancellor approval of a **CONDITIONAL GO** on July 20, 2023:

- Completed 6 conditions for Aug 30
- Completed 1 condition early for Sep 30
- Completed 1 condition early for Nov 30
- Agreed backup plan approved and in progress for Learner Financial Support

***CONDITIONS for Nov 30 continue ON Track with 1 completed early.**

GO DECISION CRITERIA CONDITIONS DASHBOARD

PREPARED BY IRP PMO, PERIOD ENDING WEDNESDAY OCTOBER 4, 2023

LEGEND: Status Indicator Change

> **Legend** G GO ✔ On Track ⚠ At Risk ● Completed

Student Solution*	Status	Technical Delivery	Status	Ecosystem Applications	Status	Security, Access, Data and Reporting	Status
Admissions	G	Environment Management	G	Integration Testing	G	Security, Access and Integration	G
Assessment Outcomes	●	Person Hub	G	Data sent to Client	G	IRP Student Security	G
Curriculum Management	●	Common Services	G	Client Validation Received	G		
Enrolment	●			Critical Development Completed	G		
Graduation	G			Non-Critical Plan Completed	G		
Learner Financial Management	●						
Learner Financial Support	TBA**						
Learner Management	✔	Partner Readiness	Status	Transformation and Change Management	Status	Transition to Operations	Status
Progression	✔	Workday	G	Institutional Readiness	G	Service Delivery	G
Registration	G	Deloitte	TBA**	Transition Plans	G	Change Management	G
Scheduling	✔	Touchnet	G	Advanced User Training	G	Financial	G
SIS Transition	G			Core Training	G	People	G
Transfer Credit	●					Technology	G
						Change Management – Hypercare Plan	G
						Change Management – Rollout and Change Plan	G

*The table above includes E2E testing of:

- Configurations
- Data Conversion
- Development
- Reports
- Integrations
- Security

**To be Adjusted – Pivoting to the agreed backup plan

FINANCIAL REPORT FY23/24 – EXECUTIVE SUMMARY

(in thousands)

	For the month of Sep-2023			Year-To-Date Sep-2023			Annual FY 2023/24			Overall Program ¹		
	Actual	Budget	Variance	Actual	Budget	Variance	Actual	Budget	Variance	Forecast	Budget	Variance
UBC Resource Costs	4,618	4,771	153	29,018	28,756	(262)	57,733	57,209	(524)	149,757	149,757	-
External Prime Consultants	-	-	-	1,845	1,798	(47)	3,643	3,596	(47)	13,551	13,551	-
Other Costs	(1,645)	(1,847)	(201)	2,788	2,079	(710)	20,231	17,693	(2,538)	53,618	43,618	(10,000)
Total expenses before contingency	2,973	2,925	(49)	33,651	32,632	(1,019)	81,607	78,498	(3,108)	216,926	206,926	(10,000)
Contingency - approved allocation	-	-	-	-	-	-	-	4,243	4,243	-	10,000	10,000
Contingency Remaining	-	-	-	-	-	-	-	25,347	25,347	-	68,000	68,000
Total after Contingency	2,973	2,925	(49)	33,651	32,632	(1,019)	81,607	108,088	26,481	216,926	284,926	68,000

Variance analysis:

For the month of September 2023:

Variance of **\$(49)k** due to:

\$153k UBC Resources

- additions **\$(156)k** - SADR (PCR2/103/499)
- timing **\$309k** - various

\$0k Prime Consultants

\$(201)k Other Costs

- additions **\$(209)k** - Comm. Support (PCR57)
- savings **\$43k** - Lease
- timing **\$(35)k** - Interdep. projects (TC)

For Year to Date, September 2023:

Variance of **\$(1,019)k** due to:

\$(262)k UBC Resources

- additions **\$(853)k** - SADR (PCR2/103/499)
- timing **\$591k** - various

\$(47)k Prime Consultants

- timing **\$(47)k** - Workday - Boomerangs for Graduation requirements

\$(710)k Other Costs

- additions **\$(525)k** - Comm. Support (PCR57)
- savings **\$263k** - Lease; Interdep. projects
- timing **\$(448)k** - various; Interdep. Projects (TC)

Annual Forecast for FY23/24:

Variance of **\$(3,108)k** due to:

\$(524)k UBC Resources

- additions **\$(1,765)k** - SADR (PCR2/103/499)
- timing **\$1,241k** - various

\$(47)k Prime Consultants

- timing **\$(47)k** - Workday - Boomerangs for Graduation requirements

\$(2,538)k Other Costs

- additions **\$(2,979)k** - Comm. Support (PCR57)
- savings **\$501k** - Lease; Interdep. projects
- timing **\$(60)k** - various (Inter. Projects (SS/TC); Workday subscription credit)

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 October 6, 2023

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

Student Completion | Proposed Work Packages

IRP Student leadership has developed a plan for a Student Completion project that includes 6 Work Packages (5 scope areas + infrastructure) over 28 months, starting in Dec 2024

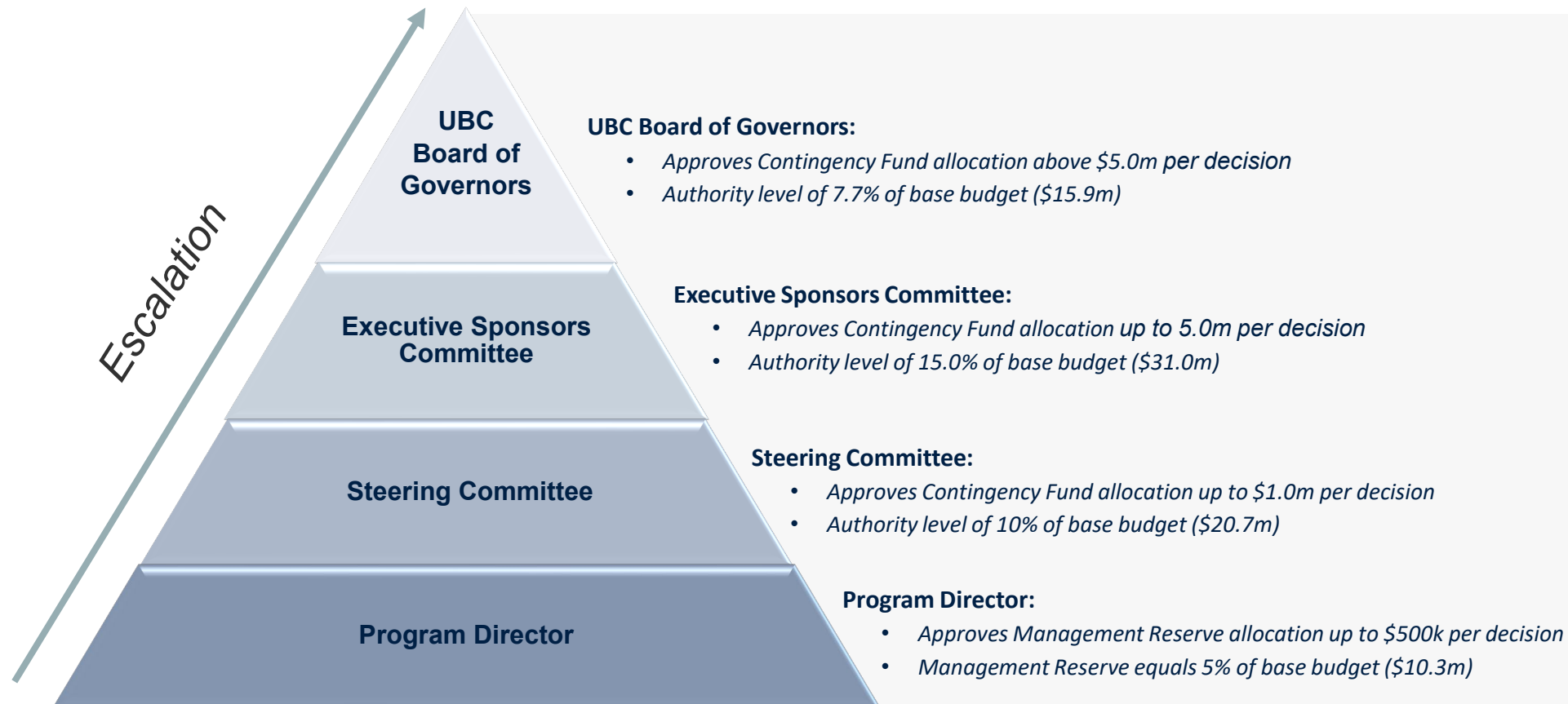
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Student Completion | Benefits

There are numerous compelling benefits of moving forward with Student Completion

- Reaping the benefits of lessons learned in R1 by planning ahead for the known follow up phase for Student, thereby maintaining momentum and retaining key resources
- Significant opportunity to continue to leverage the strong partnership with Workday as a strategic early adopter
- Achieve rapid business benefits by expediting implementation of critical and major gaps
- Enable a gradual transition of critical Academic Foundation work to ongoing sustainment, through maturing the product and knowledge transfer
- Opportunity to continue to work in close partnership with business owners to make great strides in supporting the Academic mission
- Extraordinary opportunity to retain skilled and highly sought after talent
- Leverage the effective Program and Integrated Governance already in place for IRP Student in the context of Workday HCM and Finance

CONTINGENCY AND MANAGEMENT RESERVE AUTHORITY LEVELS



Student Completion | Feedback & Endorsement Requested

Endorsement is requested from the Finance Committee for a contingency reserve request based on Management and ITAC endorsement

- The IRP Steering Committee and Executive Sponsors have both endorsed the Student Completion proposal
- ITAC unanimously endorsed the Student Completion proposal
- Endorsement is requested from the Finance Committee for the Board to approve a contingency reserve request for Student Completion

IT IS HEREBY RESOLVED that the Finance Committee recommends the Board of Governors grant approval for a release of up to \$55 million from the IRP Student contingency reserve for the purpose of funding the IRP Student Completion Program.



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](#)