









Mike Allred

Treasurer - Kualifund Foundation Board
 Chair, Kualifund Financial System Project Board
 Associate Vice Chancellor for Finance/Controller
 University of California, Davis

UCD Investing partner in: KFS 2006, KC 2008, Kualifund Rice 2009. Phased implementation of KFS and Rice beginning 2010, KC 2012.

Looking Back...
 Leading Forward
 NACUBO at 70

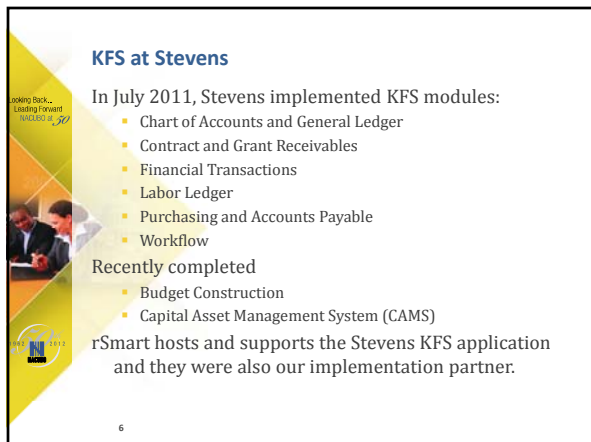


Mary Wheeler

Assistant VP for Finance, Stevens Institute of Technology
 Project leader on the KFS implementation at Stevens
 Formerly Cornell's functional representative to the KFS Functional Council

Founded in 1870, Stevens is a premier private coeducational institution focused on research and entrepreneurship. Stevens is committed to exploring the frontiers of engineering, science, and management. Three schools and one college support the mission of the Institute, which is located in Hoboken, NJ.

Looking Back...
 Leading Forward
 NACUBO at 70



KFS at Stevens

In July 2011, Stevens implemented KFS modules:


- Chart of Accounts and General Ledger
- Contract and Grant Receivables
- Financial Transactions
- Labor Ledger
- Purchasing and Accounts Payable
- Workflow


Recently completed

- Budget Construction
- Capital Asset Management System (CAMS)

rSmart hosts and supports the Stevens KFS application and they were also our implementation partner.

Looking Back...
 Leading Forward
 NACUBO at 70








Project Update: Kuali Financial System

- Kuali Financial System (KFS) 4.1.1
 - released September 9, 2011
- KFS 5.0 will include:
 - Upgrade to Rice 2.0, which provides for "backward compatibility"
- Later versions will include:
 - The Travel and Entertainment Module
 - The Contracts and Grants Billing Module
 - Incorporation of contributions from the community




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Project Update: Kuali Financial System

- Targeted date for KFS 5.0 is late 2012
- Recent Implementations:
 - Michigan State University
 - Cornell University
 - The University of Arizona
 - University of California Davis
 - Stevens Institute
 - Haverford College
 - University of Hawaii
 - University of Connecticut
 - Indiana University
 - In all - 15 schools using now or will implement next year

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Q&A with Audience and Panel

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Kuali is less risky

- Developed for colleges and universities of all sizes and complexities
- Proven in the community for everyday use, high availability
- Higher Ed oriented functionality and presentation
- FREE "try" before you "buy"
- FREE Download it all (Code, Documentation, Data Model)

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Kuali is less risky

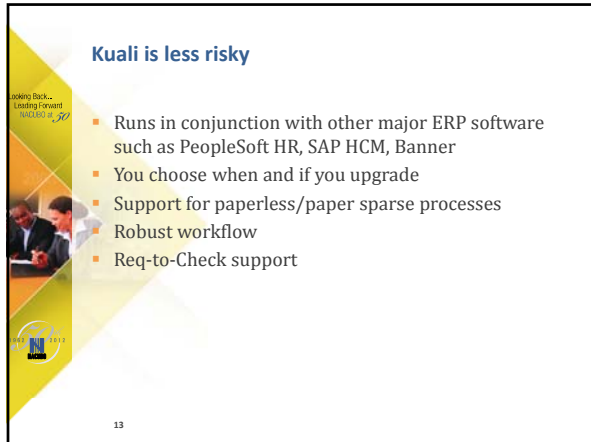
- Put it up on a small server (Linux, MySQL)...or a big one
- Runs on dedicated machines, virtual machines, in the cloud
- Proven model (thank you Indiana)
- Proven open technology
- Community processes guide development
- Functional users drive the development agenda
- Clean audits

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Kuali is less risky

- Install with a commercial partner or on your own
- Commercial-support or self-support
- Schools of various sizes and complexity have implemented and run for several years
 - Research
 - Mid-Major
 - Private
 - Public
 - Community College
- One-campus or full-system operation (single or multi-chart), (fund or cost accounting)

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Kualiti is less risky

- Runs in conjunction with other major ERP software such as PeopleSoft HR, SAP HCM, Banner
- You choose when and if you upgrade
- Support for paperless/paper sparse processes
- Robust workflow
- Req-to-Check support

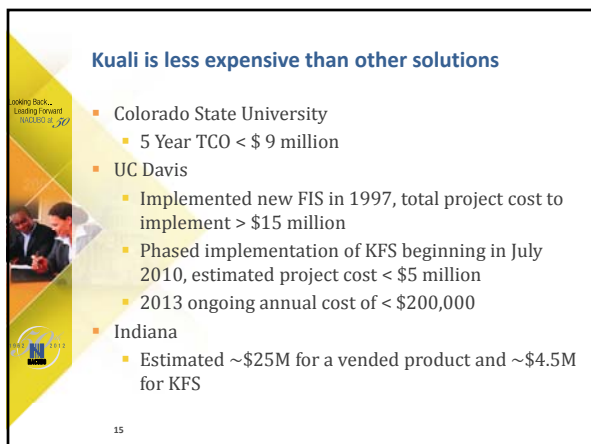
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Gartner Industry Research – February 2011

Any higher education institution considering replacement or adoption of a financial or research management system should seriously consider an open-source software alternative. Viable point solutions are now available with commercial support.

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Kualiti is less expensive than other solutions

- Colorado State University
 - 5 Year TCO < \$ 9 million
- UC Davis
 - Implemented new FIS in 1997, total project cost to implement > \$15 million
 - Phased implementation of KFS beginning in July 2010, estimated project cost < \$5 million
 - 2013 ongoing annual cost of < \$200,000
- Indiana
 - Estimated ~\$25M for a vended product and ~\$4.5M for KFS

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**Kuali is built for all size schools?
Implemented or implementing in 2012-13:**

Small

- San Joaquin Delta College
- Stevens Institute
- Haverford
- Naval Post Graduate Inst.

Large

- Colorado State University
- Cornell University
- Indiana University
- Michigan State University
- University of Connecticut
- UC Davis
- University of Arizona
- University of Hawaii
- UC Irvine
- University of Southern California
- University of Maryland

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Small Schools-Stevens

- Operating budget of approx. \$175 million
- Approx. 3500 accounts and 300 users

Using all of the features in a less complicated way than larger colleges and universities.

Examples:


- Access/security using only the Organization attribute
- For sponsored agreements fiscal officer = PI
- Only 20 budget coordinators
- Using responsibility center feature only for reporting
- Following a standard disbursement workflow for all units

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Cloud Solutions-Stevens

- rSmart provides all of the IT expertise, hardware, and software for the Stevens KFS application.
- Also provided is a disaster recovery site, in a virtual location
 - updated every 4 hours
 - ready to use within 24 hours of an event affecting the primary site
- Level 1 support is provided by Stevens to campus users
- System issues are forwarded to rSmart by a limited number of central users

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Looking Back...
Looking Forward
2003-2012

Schools do not need large IT departments to implement Quali

- UC Davis Example:
 - Systems Development
 - 4.0 FTE Supporting KFS through implementation
 - 4.5 FTE Supporting other applications
 - Effort Reporting, EDMS, Concur Expense Reporting, Payment Gateway, e-Procurement, Cashiering, Storehouse, CAMS, EDW
 - Systems Operations
 - 6.5 FTE
 - DBA, Systems Administration & Support

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Looking Back...
Looking Forward
2003-2012

Size of IT staff for implementation -Stevens

- IT staff is very small focused primarily on supporting the academic units and IT infrastructure, very few resources are devoted to administrative systems
- Internal IT staff assisted with the authentication and authorization via the campus portal and some of the interfaces
- All other IT expertise for the implementation was provided by rSmart.
- With the transparent system parameters and table structures, an implementation of KFS is primarily a functional exercise with technical support, instead of a technical exercise with functional support.

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Looking Back...
Looking Forward
2003-2012

There is a support structure

- Support from community and Commercial partners
- See The Inevitable Unbundling of Software and Support by Brad Wheeler in Campus Technology, Feb 27, 2004:
 - Unbundling is an economic trend favoring greater marketplace choice
 - No black box as software is open and changeable
 - Unbundling hedges a university's risk as it has more options

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Looking Back...
Looking Forward
2003-2012

Robust Support from Commercial Affiliates

- Implementation Projects
- Operational Support
- Custom Enhancements
- Upgrades

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Looking Back...
Looking Forward
2003-2012

Kuali is sustainable

- KFS 3.0 released July 2009
- KFS 5.0 Fall 2012
- KFS 6.0 2013
 - New modules for Travel Expense Reporting and Contract & Grant Billing
- KFS 2013-14
 - Kuali Stores and e-Procurement
- Currently, KFS has \$1.35M in annual resources to continue sustainment
- Enhancements made by adopters are fed back into the core codebase

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Looking Back...
Looking Forward
2003-2012

Kuali can be integrated with other systems

- IU – PeopleSoft
- MSU – SAP
- UCD, UCI – Oracle on Demand\PeopleSoft , ellucian (SG Banner)
- Several of those that have implemented KFS did so in a phased approach that involved integration to legacy systems/applications

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Looking Back...
Looking Forward
2010-2011
2011-2012



A Work in Progress-Leveraging the Community

- Gaps are identified and filled by KFS adopters
- Adopters share their modifications with the community
- Enhancements included in future releases are decided on by the Functional Council with input from the KFS user community

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