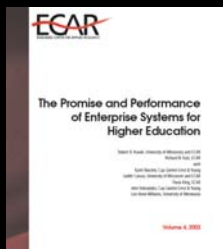




A Strategy of Interdependence

Proven Outcomes

At the end of the twentieth century and into the twenty-first, higher education has invested, by a conservative estimate, \$5 billion in administrative and enterprise resource planning (ERP) systems. ERP—three letters that represent the tremendous time, energy, and money consumed by hundreds of institutions over the past decade.

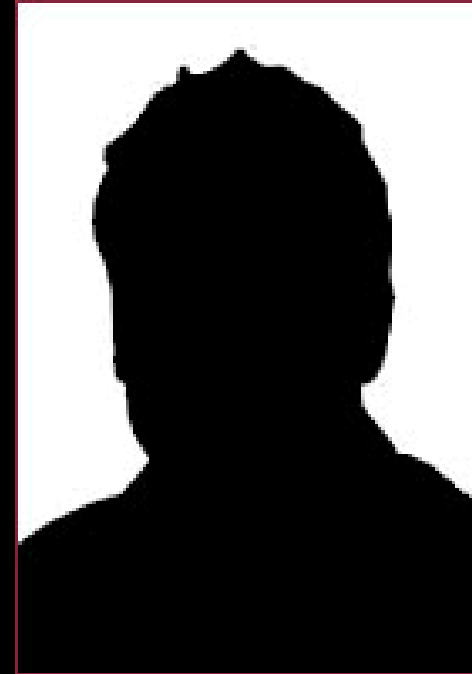


“The Promise and Performance for Enterprise Systems for H.E.”
Kvavik & Katz, ECAR, 2002



\$10's of Millions?

“But that is just
how much these
systems cost.”



Provost, Big University



Is There Another Way?



Kuali Announced 2004

THE CHRONICLE OF HIGHER EDUCATION^W

August 30, 2004

2 Universities Team Up to Create Free, Open-Source Financial Software for Campuses

By JEFFREY R. YOUNG

Frustrated with the high cost of commercial financial-management software, Indiana University and the University of Hawaii are leading an effort to build a free, open-source alternative. The project's leaders say the effort could save colleges millions of dollars.



Today

kuali
foundation®

77 Members, 8 Projects, 12 Commercial Affiliates,
US\$19M Annual Spend, \$28M in Net Assets



Re-Asserting Academic Values

Scholars

Research

Sharing Among
Many Institutions

Teaching

Students



The US\$ 5 Billion Journey





Rights and Provisioning

Don't
Own

ERP
Vendor.Com



*Manage by
Contracts
(and prayer)*

Do
Own



Homegrown



*Our Rules
(& responsibilities)*

On Site

Off Site

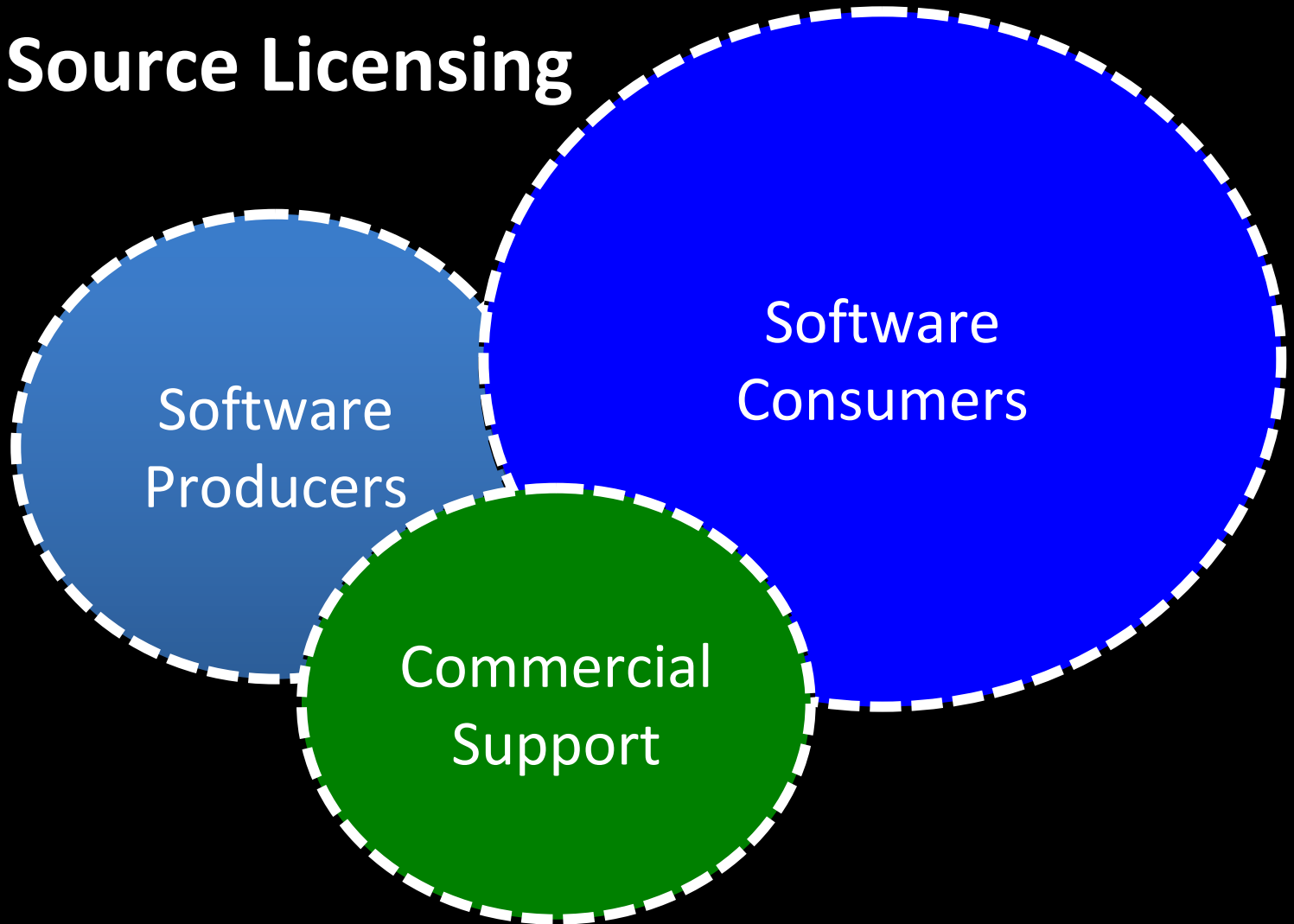


Kuali 101



Kuali Community Ecosystem

Open Source Licensing



Two Models of Software Production

The Bazaar



The Cathedral

Eric Raymond



A gap...

Need for a
Hybrid Model

...Community Source

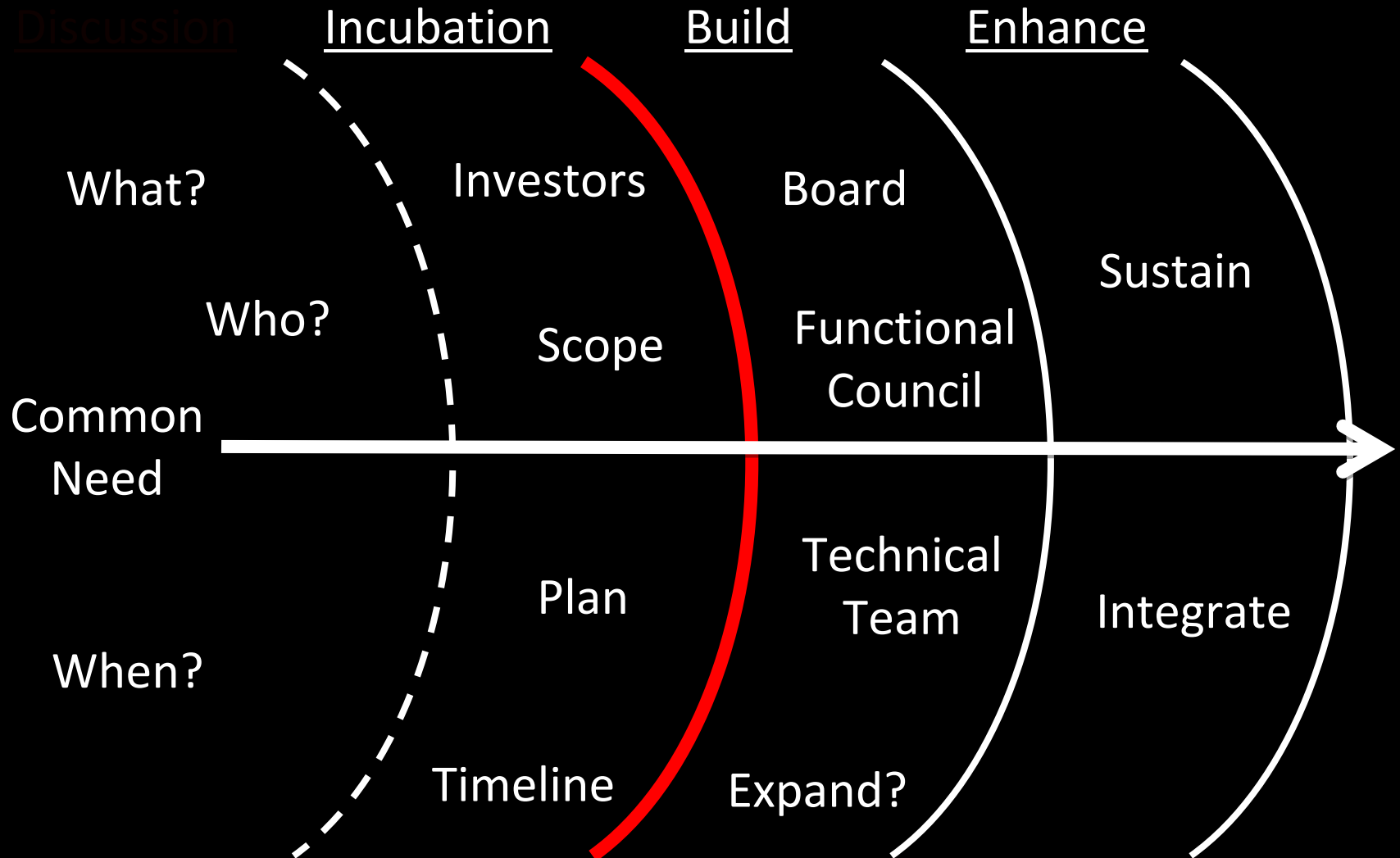
“The Pub...the Place Between
the Cathedral and the Bazaar”



How Does a Kuali Project Start?

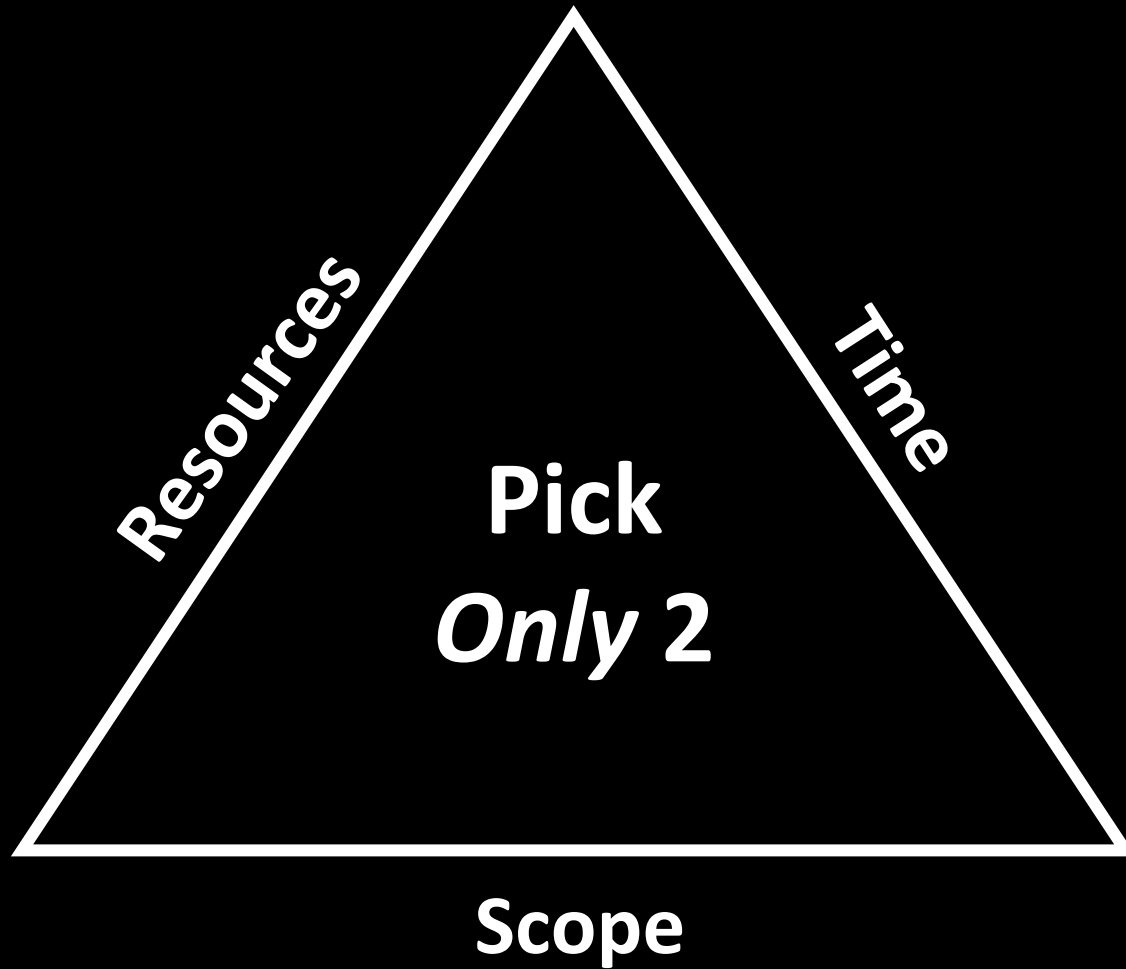


Typical Project Stages



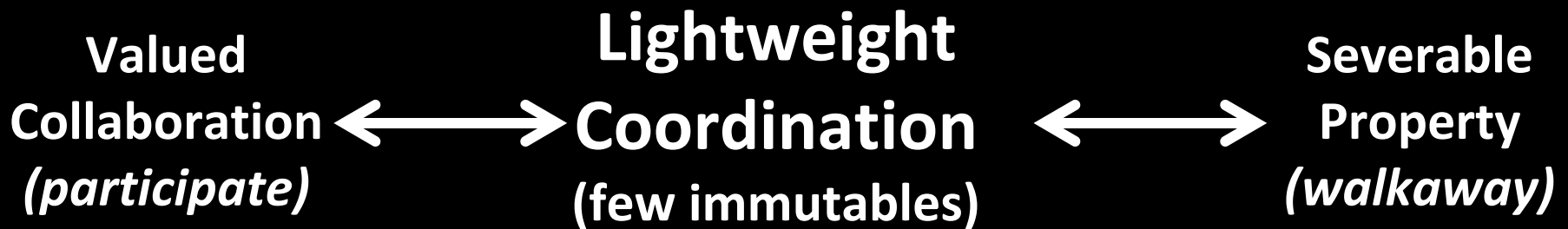


Reality Triangle





Kuali Secret Sauce?... *Values*

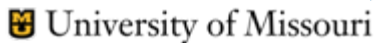




Why be a Member?



Institutional Membership





Role of Commercial Affiliates?



Commercial Membership

**Kuali Commercial
Affiliates (KCAs) provide:**

• **Services**

- Planning
- Implementation
- Cloud Delivery

• **Support**





Our Next Decade



Evolving

Scrappy
Start Up

Mature
Suite of
Offerings

2004

2024-



- *Values and Culture*
- *How We Do Things*
- Lessons
- Technology Change
- Porfolio-ness of a Suite
- Off Premises (Cloud)
- *Campus Achievements*



Kuali "Choice" Ads



LYNN JOHNSON
Chief Financial Officer,
Assoc. Vice President of Finance



Colorado State University **SAVES MILLIONS** by choosing Kuali

Colorado State needs a **comprehensive financial system** designed for higher education.
THEIR CHOICE IS KUALI

Colorado State needs an integrated **research administration system** to serve faculty and ensure compliance.
THEIR CHOICE IS KUALI

Colorado State needs to **keep its scarce resources in its mission** rather than in costly ERP software.
THEIR CHOICE IS KUALI



Kuali is an open source, comprehensive suite of software that is free of licensing costs and meets the ERP needs of higher educational institutions of all sizes. Learn more at:

www.kuali.org/choice



Indiana University **SAVES MILLIONS** by choosing Kuali

Indiana University needs a **comprehensive financial system** designed for higher education.
THEIR CHOICE IS KUALI

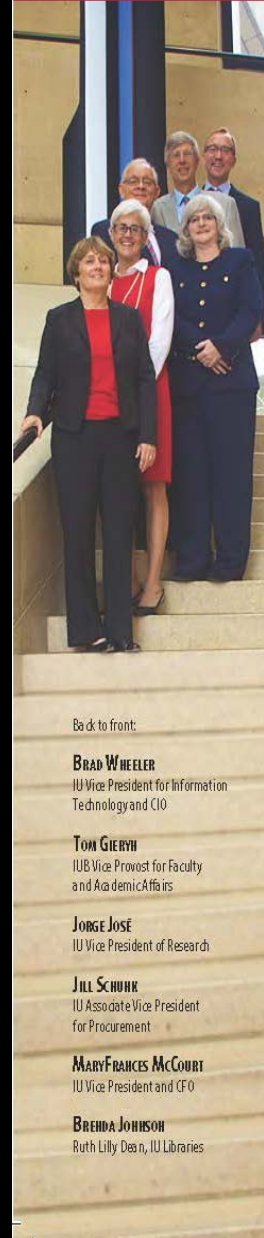
Indiana University needs an integrated **research administration system** to serve faculty and ensure compliance.
THEIR CHOICE IS KUALI

From **faculty reporting** to **library collections**, Indiana University keeps its resources focused on its mission rather than costly enterprise software.
THEIR CHOICE IS KUALI



Kuali is an open source, comprehensive suite of software that is free of licensing costs and meets the ERP needs of higher educational institutions of all sizes. Learn more at:

www.kuali.org/choice



Back to front:

BRAD WHEELER
IU Vice President for Information Technology and CIO

TOM GIERYN
IUB Vice Provost for Faculty and Academic Affairs

JORGE JOSÉ
IU Vice President of Research

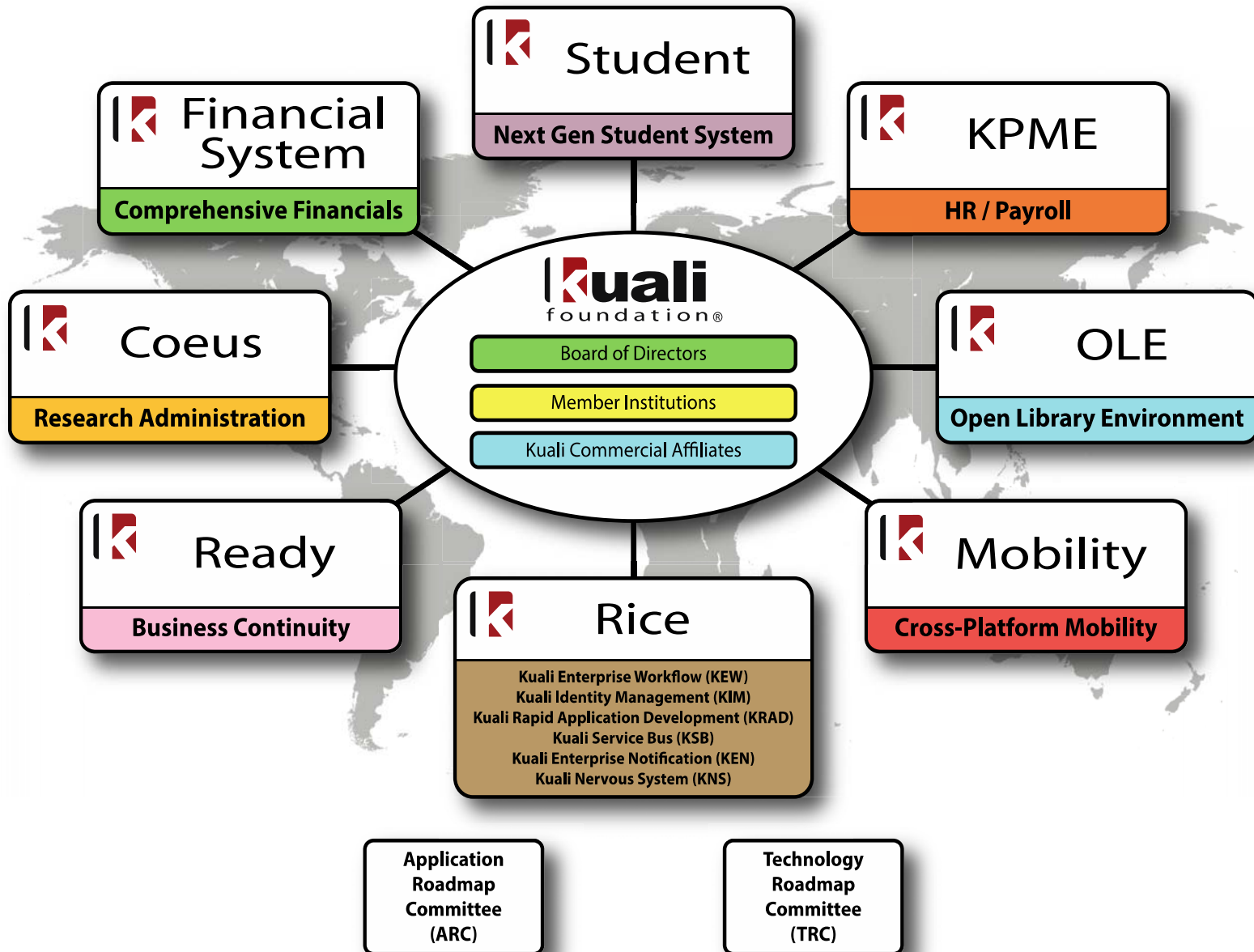
JILL SCHUBK
IU Associate Vice President for Procurement

MARYFRANCES MCCOURT
IU Vice President and CFO

BRENDA JOHNSON
Ruth Lilly Dean, IU Libraries



Portfolio-ness





Kuali “NOW”

Illustrating the VALUE of Kuali Modules Now
with Legacy Systems



kuali®
Keep your money in your Mission

Indiana University uses the Kualo approach and many partners to truly Keep OUR Money in OUR Mission