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?
THE CHRONICLE OF HIGHER EDUCATION
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

77 Members, 8 Projects, 12 Commercial Affiliates,
US$19M Annual Spend, $28M in Net Assets
Re-Asserting Academic Values

- Scholars
- Research
- Teaching
- Students

Sharing Among Many Institutions
The US$ 5 Billion Journey

- Built....
- Bought.........$5B......

1980s 1990s 2000s 2010s 2020s

What Path for Round #3?

Cloud?
Rights and Provisioning

Don’t Own

ERP Vendor.Com

Cloud

Manage by Contracts (and prayer)

Do Own

Homegrown

Our Rules (& responsibilities)

On Site

Off Site
Kuali 101
Kuali Community Ecosystem

Open Source Licensing

Software Producers

Commercial Support

Software Consumers
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

- **Discussion**
  - What?
  - Who?
  - When?
  - Common Need

- **Incubation**
  - Investors
  - Scope
  - Plan
  - Timeline

- **Build**
  - Board
  - Functional Council
  - Technical Team
  - Expand?

- **Enhance**
  - Sustain
  - Integrate
Reality Triangle

Pick

Only 2

Resources

Time

Scope
Kuali Secret Sauce?... Values

- Valued Collaboration (*participate*)
- Lightweight Coordination (*few immutables*)
- Severable Property (*walkaway*)
Why be a Member?
Role of Commercial Affiliates?
Kuali Commercial Affiliates (KCAs) provide:

- Services
  - Planning
  - Implementation
  - Cloud Delivery
- Support
Our Next Decade
Evolving

Scrapy Start Up

2004

Mature Suite of Offerings

2024-

- Values and Culture
- How We Do Things
- Lessons
- Technology Change
- Portfolio-ness of a Suite
- Off Premises (Cloud)
- Campus Achievements
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.
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Indiana University needs an integrated research administration system to serve faculty and ensure compliance.
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From faculty reporting to library collections, Indiana University keeps its resources focused on its mission rather than costly enterprise software.
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Portfolio-ness

- Financial System
  - Comprehensive Financials
- Student
  - Next Gen Student System
- KPME
  - HR / Payroll
- OLE
  - Open Library Environment
- Mobility
  - Cross-Platform Mobility
- Coeus
  - Research Administration
- Ready
  - Business Continuity
- Rice
  - Kuali Enterprise Workflow (KEW)
  - Kuali Identity Management (KIM)
  - Kuali Rapid Application Development (KRAD)
  - Kuali Service Bus (KSB)
  - Kuali Enterprise Notification (KEN)
  - Kuali Nervous System (KNS)

- Application Roadmap Committee (ARC)
- Technology Roadmap Committee (TRC)
Kuali “NOW”

Illustrating the VALUE of Kuali Modules Now with Legacy Systems
Indiana University uses the Kuali approach and many partners to truly Keep OUR Money in OUR Mission