

# SAN JOAQUIN DELTA COLLEGE

## TOTAL COST OF KUALI

### IMPLEMENTATION APPROACH

As the first community college to implement the Kuali Financial System, San Joaquin Delta College played an important role in identifying unique community college requirements to address in the development of the system. "When it came to adding functionality to the system, we got everything we asked for from the community. They really bent over backwards to implement our requests to ensure that the Kuali Financial System meets the needs of community colleges," says Lee Belarmino, Chief Information Officer. This allowed the college to implement Kuali without having to make significant changes to business processes.

Still, a major objective in implementing the Kuali Financial System at Delta College was to make deliberate improvements to business processes and to distribute budget development and management across the college's programs. "The goal is to create a complete culture change and each aspect of this change touches our implementation," explains Racquel Puentes, Budget Manager. "The system allows us to distribute the budgeting process, so we needed to complete Fiscal Officer training to explain the system, processes and responsibilities. The automated approval workflows and the reporting are huge improvements and require a fraction of the time they did before. All of this leads to more effective financial management of the college, but it is a change. The system has not forced changes upon us. Rather, the system promotes business process improvements that may sometimes feel a little overwhelming but will ultimately allow us significant and powerful advantages."

To implement functionality that matched Delta College's business needs, the Kuali Financial System required configuration. Delta College leaned on rSmart to complete the configuration work. "The Kuali Financial System is completely malleable," explains Mr. Belarmino. "You can configure it to do anything you need, but you can't just put it in and turn it on. rSmart consultants translated our business requirements into parameter settings to configure the system. We really benefited from their full system expertise, and I'm so pleased that the next community colleges that they assist will benefit from our experience."

Throughout the Delta College Kuali implementation process, <b>rSmart provided:</b>	<b>Project Leadership:</b>	Assisted San Joaquin Delta College to define project goals and approach
	<b>Project Management:</b>	Developed, managed and revised comprehensive project plans with task-level detail and interdependencies
	<b>Change Management:</b>	Defined training and communication plans, and stakeholder engagement strategies

## How did rSmart assist San Joaquin Delta College in its implementation of the Kualu Financial System?

### Data Conversion

rSmart provided the methodology and converted data from the legacy system to the Kualu Financial System.

- Converted the chart of accounts and all associated legacy data
- Developed key system interfaces to Human Resources, Accounts Payable and Purchasing

### System Configuration

rSmart provided expertise in configuring the Kualu Financial System to meet San Joaquin Delta College's needs.

- Reviewed options and impacts with San Joaquin Delta College staff
- Iterated through training and configuration to ensure that San Joaquin Delta College staff could make informed configuration decisions
- Completed and documented final system configuration

### Modification Development

rSmart developed new functionality in alignment with community models, allowing contribution back to the Kualu community.

- Identified community members with similar needs
- Facilitated collaborative development
- Programmed needed modifications
- "Packaged" modifications to ease sharing

### Testing

rSmart employed test automation tools and continuous integration tools to streamline testing and improve reliability.

- Developed test plans and scripts
- Completed initial system testing
- Trained lead users on testing processes

### Risk Mitigation

rSmart provided flexible resource loading as institutional needs changed.

- Completed unplanned system modifications
- Provided hands-on training and validation for technical resources using new technologies and skills
- Addressed issues
- Provided essential expertise to assist both in analysis and development

## IMPLEMENTATION BUDGET

Budget Item	Kualu Financial System
Technical Staff	\$945,000
Hardware & Support Software	\$350,000
Travel	\$75,000
Consulting	\$975,000
Kualu Foundation Membership	\$200,000
Kualu Financial System Total	\$2,545,000

"Our Kualu Financial System cost less than half of what we had priced for comparable proprietary systems. We spent about \$1 million more than it would have cost us to upgrade our current system, which used much older technology and was not meeting our needs," says Mr. Coombs.