September 5, 2013
Kuali-CurrCtrl Meeting
University of Hawai‘i at Mānoa, Bachman 113

Present: Joanne (VPAA Office), Mitch (HAW), Jason (HAW), Susan (KCC), Kahele (UHMC), Ryan (MAN), Myrtle (MAN), Russell, Jon (HIL), Kathlen (KAU), Steve (ITS), Kevin (WIN); LEE (Pete Gross can’t be here), April.

1. System perspectives on the change

Steve has many responsibilities, including oversight of Kuali Student, which includes Kuali Curriculum Management (Kuali CS, KCS). IT is responsible for making sure things technological work properly. CurrCtrl has been excellent in terms of meeting campus curriculum needs; but dependent on Thanh; we need a system-supported system; sustainability and standardization.

Kuali has developed a curriculum management module over the past few years: open source, but well-developed and maintained as a higher education resource. UH has been a founding member of Kuali, so we have a real say in what happens/what can be done by Kuali. Also several companies provide development/programming services.

R-Smart investigated CurrCtrl vs. Kuali, concluded that Kuali can make it, including interface with Banner. Exec group Linda J, John M, David L, plus Steve and Joanne, decided that we’d go forward with Kuali. Support distributed across ITS—primary person, secondary person as backup, tertiary as basic backup. Primary position being searched, but we will keep moving forward.

Opportunity to review how do we do curriculum management; can we make changes [towards greater cross-system uniformity, user-friendliness, streamlining]

CurrCtrl continues. Foundations will be added this year, and campuses will continue to use the system for curriculum review. Monthly conference calls will be held the fourth Weds of the month; the first will be on Sept. 25 at 4 pm; these will run through May. Joanne’s office will send out contact information.

2. Overview of Kuali

Thanh will send out features matrix to all ptcpts. (Slide 6)

Features of Kuali
  We need to establish common terminology shared by all campuses
  All settings will apply to all campuses
Kuali can look into the content of proposals and route or otherwise act on

RICE = Kuali workflow software—will enable us to establish approval sequences with offices rather than individuals at decision points.

Robust search engine: Kuali can search content of proposals

No fancy type (unlike CurrCtrl)
Configuration: certain changes of format, etc. can be done

Customization: we want to keep these to a minimum, as these do not flow into updates. We can propose changes to Kuali, may be adopted if all systems.

ITS will handle almost all tweaks, including many that the campus administrators used to do.

3. Group demo: we created a course proposal in Kuali CM: Informal comments and observations. A detailed list of Kuali can-dos and questions about functions is attached to these notes. On Sept 9 and 10, Myrtle, Pete, and Mitch added questions, which are included; additional questions might come in.

The items will be organized and the list re-distributed before the Sept 20 meeting.

[See attachment]

4. Steve discussed the RFP process. The purpose of the RFP is to identify a company to do migration, to install Kuali and set up Kuali the way we want it

The RFP will be a collaborative process: Thanh has completed a first draft. Cara Kuwano (ITS system services manager, who worked with Kuali FS companies) will oversee the official RFP.

Tentative timeline: October to get it out; full competitive process. Input will be solicited in the wording of the RFP and later, in the scoring/selection process (which may be iterative). Early January, possibly, the selection will be made.

In parallel, we need to meet to develop campus needs/language. The first work session of CurrCtrl campus admins and others for this purpose is Sept. 20, 1-4. Melissa will send out location and travel information.
Other institutions are using Kuali CM already. The Kuali website (www.kuali.org) provides some resources. Thanh has already been plumbing it for information, and we will establish other communication lines.

5. Curriculum Central

- Foundations--on TEST site--new tab; Foundations form is a single-screen with multiple items and attachments, review and comment, PDF conversion and printing, search, coproposer; course created/reviewed separately from course creation but can import existing course for certification review
  - Search not available for non-Foundations courses
  - Thanh will turn on in system settings
  - 6 community college campuses will be using this
  - Thanh will work on approval process next, hope to bring online in January
- Thanh has established a new Q&A page for transition to Kuali, multiple questioners and multiple answers
- Conference calls are set for the fourth Wednesday of each month at 4pm; Melissa will send out announcement/contact info for our first meeting, Sept. 25, 4 pm.
  - We will talk about the transition as well as about Curriculum Central at these meetings.
  - Joanne’s office maintains a Curriculum Central information page, where these minutes will be posted.
- Data from Production is going to Test this weekend, except for KCC programs

Submitted by April Scazzola
9/10/13

Attachment: Kuali Can-Dos and Maybes, Sept. 5 lists plus additional questions from Myrtle, Pete, and Mitch.
Kuali Can-Dos and Maybes.

September queries have been supplemented with September 9 and 10 queries from Pete G [PG], Myrtle Y [MY], and Mitch Okuma [MSO].

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Kuali can do:

- Specify range for number of digits for alpha and number (for CC, 2-3 digits for course number)
- Select multiple forms of interaction for a single course
- Single course: can specify hour distribution for multiple forms of study/work = important for Credit Hour equivalencies (accreditation/feds)
- Can specify Final exam or not or other forms of evaluation
- Can add SAT option and competencies to the list of master phrases for prereqs (must have completed one course...specify course)
- Can identify which campus a multi-campus course proposal belongs to (e.g., Eng 100, Math 100)
- GE information can be included/or not (system decision)

Can Kuali do this?

- Need to be able to display courses on same campus/all system campuses with a particular alpha—CurrCtrl does this, and it enables us to select unused number and to compare potentially courses on other campuses
- PLOs must be linked w/SLOs, CLOs, and competencies for CCs and different accrediting agencies (CurrCtrl does this)
- Need to be able to chain comments/queries, review all comments/responses
- Desirable: “blanket statements” can be inserted into all courses within a program, e.g. Prerequisite : Admission to program/major. This can actually be handled as a question in the course approval/modification function. [MY]
- What kinds of reports are available/can be generated in Kuali; what kinds of reports do we need/regularly use?
Can campus administrators be assigned certain small functions without going to ITS? E.g., updating names for approval roles? Editing proposals in process/after approval? Ability to log in as someone else (as in CurrCtrl), raw data edits, etc.

Can program LOs be accessed by course proposals and program proposals

What email options are available in Kuali?

Can approval processes for the various general education designations—foundations, diversification, focus—be built into the Kuali approval process? This is not the same as reflecting GE information as noted in the first section but actually building an electronic approval process of general education designations into the course approval process. [MY]

Can Kuali reflect course numbers that include both numbers and a letter, e.g. 304C? [MY]

Can the outline be returned to the proposer with only certain fields opened? [PG]

Can a proposer send the outline back after changes have been completed? [PG]

Can several different routings be used? [PG]

If Kuali allows changes to an outline after it has been approved, does it have an audit log to track who and what changes were made to an outline? [PG]

Does Kuali validate course information (alpha and number) so that only courses that exist at the college can be used as prerequisites and corequisites courses? [PG]

Can Kuali track general education designations (DS, DH, FW, etc.) and focus or graduation designations like HAP and OC that are associated with a course but independent of the course outline? For example, the general education designation is approved after a course is approved so it will not appear on the outline. [PG]

Is there going to be a connection between Banner and Kuali? Like a upload process of some sort in Banner? [PG]

Viewing/Reporting
Are we able to get ODBC connectivity to Kuali Curriculum Database? I would like to be able to export information to load into our campus’ Assessment
Database. [MSO]
Can I get a report of all the pilot courses? [MSO]
Can I get a report of all courses that have not been reviewed in the past 5 years? [MSO]
As part of a Course Report, can it list who proposed the course, who all approved it and when? [MSO]
Can I get a report of all the courses that were (created, modified, deleted) during an academic year? [MSO]
Am I able to view statuses of all courses that are in the approval process? [MSO]

System Core
If after determining the CORE items, if at a later time we determine we would like to modify the CORE item list, is that possible? [MSO]
If I field is removed from core, do we lose historical information for that field? Or is it retained as a snapshot of what core was at the time the course was proposed. [MSO]

Creating proposal
Can I reactivate an archived course? [MSO]
Does the system keep track of entire history of course (ie when it was proposed, when it was deleted, when it was modified, etc) [MSO]
Does system support okina’s? Is it a must have? [MSO]
How do I create a new course by copying an existing course? [MSO]
Can an English Instructor create a Physics course? [MSO]
Can an English course belong to a department other than English? Say Business? [MSO]
Am I able to reassign ownership of a course to another person? [MSO]
Who is able to modify a proposal? Only the owner? Any of the members in the approval sequence? [MSO]

Process
Can I set black-out proposal date/time? That is no new proposal submissions will be accepted after 9/30/2013 4:30pm. [MSO]
Does approval process support "fast-tracking"? [MSO]
If a course is in the middle of an approval process and it is later determined that it is in the wrong approval process are you able to reassign it to a different approval process? [MSO]
What happens if a member in the approval process is replaced by someone else? [MSO]
Should Kuali assist with course articulation among the different campuses? [MSO]
Can I select between a regular course review and a pilot course review and a 20% annual review? [MSO]
As part of course routing, does it send an email notification? [MSO]
Messaging
Does the system support a campus specific announcement board? [MSO]
Does the system support a UH System forum? Perhaps articulation discussions could be posted here and well as a means for users to support each other. [MSO]

Does the system need to integrate with any other systems in addition to Banner? [MSO]

Data Migration
Campuses’ data that are not part of core items, how will they be migrated? [MSO]

Other Conversion Concerns

Conversion of data from Banner/CurrCtrl to Kuali: many courses only have Banner information; exporting other stuff that is not going to be in Kuali? Mānoa has only a small number of its total courses in CC so a Banner to Kuali data transfer is imperative. [MY]

Exactly which are Banner fields: Edna Van Doorne

Training: shared with ITS: will contractor train the trainers for system/campuses, plus generate documentation for users?

Approval process: we need access to Kuali approval processes so we can evaluate [Thanh will send us this when he gets it from Kuali]