A Discussion with Chris Thompson, CEO Moderas LLC.

September 4, 2015, Washington DC

Summary

- The number of Kuali Commercial Affiliates, now called "Commercial Members," is five: *EBSCO, HTC Global Services, Navigator Management Partners, Open Collab, and Polus Solutions*. (Open Collab was and continues to be a major contributor to software development and implementation).

- Two former Kuali Commercial Affiliates—Moderas and Vivantech are actively marketing and supporting their derivative extensions of Kuali Research Administration (Coeus). Neither is a Kuali Commercial Member.

- No former KCA has yet publicly committed to support the Kuali Financial Systems, Kuali Ready disaster planning, or Kuali Rice.

- The Kuali Open Library Environment continues separately from Kuali Inc. HTC Global Services provides development support

- Kent Brooks "I Was Just Thinking" blog post "Kuali/Kualico Update: One year and a Cloud of Dust" provides a critical extensively researched incisively written report on the first year of Kuali Inc. [blog.kentbrooks.com/?p=2775].

- Boston College continues its development of Kuali Student, labelled Eagle Apps which may become available as open source.

- There is an option for Ariah or the Apereo Foundation, or both sequentially, to make the ECL (Education Community License) version of the Kuali software available rather that the Affero licensed version. This could be done by Ariah or the Apereo Foundation as a community-building activity.

- im+m may have the opportunity to complete the Curriculum Management software as discussed with rSmart in order to support Gainful Employment compliance and the associated analytics, and other functions.

The Meeting

Chris was attending a Federal Demonstration Partnership (FDP) meeting September 2-4 at the Hyatt Regency Capitol Hill. The DFP is "Redefining the Government & University Research Partnership." It is an initiative of the National Academies.

FDP member organizations are expected to attend all FDP meetings, ideally with a team including research administrator, faculty representative and, if desired, IT and compliance representatives; actively participate in FDP committees, demonstrations and surveys; complete their institution's annual report to FDP in a timely manner; and make responsible and timely payment of applicable dues and registration fees.

Freqently Asked Questions, sites.nationalacademies.org/PGA/fdp/PGA_061808

The Conference

Chris said the conference was focused on activities of the project. The program included information technology sessions, training, and compliance—topics typical of research administration. Chris also met with those who were interested in the Moderas software products. He said Kuali Inc. (KualiCo) had two representatives at the meeting.

He did comment the presentation on FISMA (Federal Information Security Management Act of 2002) compliance. The presentation did not describe the scope of needed FISMA compliance for research administration. He commented that research administration did not or rarely would have files requiring FISMA safeguards, He had failed to ask a question so the presenter could provide an authoritative response.

Kuali Foundation Inc, Kuali Inc. and KualiCo

Chris commented he had some conversations with the Foundation about Moderas' status as a commercial member.

Earlier there were commercial affiliates: now there are five commercial members including EBSCO, HTC Global Services, Navigator Management Partners, Open Collab, and Polus Solutions [www.kuali.org/membership/members]. Earlier commercial affiliates are listed in test-www.kuali.org website. This included Cloud providers Vivantech, Sigma Systems Inc, rSmart, Moderas, Kplus2 and eThority [test-www.kuali.org/cloud]. The website is likely not authoritative.

Chris said only two or three commercial affiliates supporting a Kuali-derivative Research Administration remain following the transfer of intellectual property, purchase of equity, and transfer of project funds to Kuali Inc (KualiCo). He said Moderas and Vivantech remain in communication and are likely the only two KCAs (Kuali Commercial Affiliates) actively marketing derivative products since KCA rSmart was acquired by Kuali Inc.

Chris asked if the appointment of Darren Wesemann to the Kuali [Inc.] Board of Director] suggests venture capital financing. I said Salt Lake City has a vibrant venture capitalist community. They tend to invest in Utah-based firms. So that is possible. To invest assuming Kuali Inc. will capture significant market share from Ellucian, Oracle and Workday seems marginal.

Chris said the Foundation had modified the license of software distributed by the Foundation from ECL (Education Community License) to the Affero license. I said another person had a similar opinion, but I had not seen documentation. I said tit is legal, but would not apply to

software that has already been downloaded (that is retroactive relicensing by the copyright owner is not permitted by the ECL license itself).

The Kent Brooks "I Was Just Thinking" Blog

On August 31, 2015 Kent Brooks published "Kuali/Kualico Update: One year and a Cloud of Dust" [blog.kentbrooks.com/?p=2775]. Chris said he had submitted a comment, decided to edit it, and found comments were gone. I said it is likely that Kent wanted to protect the commenters since blog commenters can usually be identified. Chris said he thought the comments were generally critical and complimented Kent's article.

Kent's well-researched and clever writing may create additional issues for Kuali Inc. and others. Procurement Officer Faith Williams will find the questions about timing of the Kulali Inc. announcement before the RFP has closed will be difficult to explain.

The Kuali Foundation may now identify the Kuali Director on the Kauli Inc, Board, which may provide additional context.

There are undesirable effects from the Kuali strategy. Colleges and universities may be hesitant to adopt any solution until there is increased clarity. This provides others—Oracle, Ellucian and Workday—an opportunity to complete their new development, The Kuali difficulties with the transition now appear to disparage open source in higher education more broadly. (The monetization of Moodle doesn't help either).

Role of Boston College

Chris was hoping an announcement of Boston College that their completion of Kuali Student (named EagleApps) would be available in open source as it is completed, which I labelled "progressive release." Implementation is expected to be completed in September 2016 or later. I said I know of no *public* documents that a decision has been made to release their work as open source. This adds to the uncertainty. Since Boston College has a responsibility to their constituency for the successful implementation, progressive release by Boston College staff could divert focus and results. I have heard of no discussion about someone else taking responsibility for distribution or support of Eagle Apps if the source code were available. Chris cited Norman Wright's KPlus2 blog "New Things In Kuali Student via EagleApps at Boston College as supporting open source release as developed. He wrote "The source code has been moved to BC's private GIT repository with the intention of making it publicly available after our initial release" [/kplus2-blog.blogspot.com/2015_07_01_archive.html].

im+m and Curriculum Management

As part of my participation in the U.S. Department of Education's Gainful Employment public "rule-making" I saw an opportunity to extend Kuali Curriculum Management first to record the additional statistics and to management the communications and review of the historical records with the Department. If these statistics were expanded to all courses, this would support analysis of effectiveness, unit costs, and ability to repay student loans. If the NCHEMS (National Center of Higher Education Management Systems) Induced Course Loan Matrix was available in current technology, this would provide probabilities of success (completion of a degree and

certificate) and return on investment (using starting and mid-career salary data from the Brookings "Beyond Rankings" project).

I was hoping Chris Coppola—then CEO of rSmart, now COO at Kuali Inc.—would find the resulting product a useable addition to the Kuali-based rSmart software, and consulting and cloud services. He spent two days in Washington with im+m thoroughly assessing this alternatively. Later he became involved in the Kuali Community Strategy Sessions. Although rSmart had a better-performing cloud-based Curriculum Management module, he declined to add products.

im+m may have an opportunity to move forward on curriculum inventory and management using the architecture of the high-performing student accounts system. If so, I said it should be based on Kuali's ECL version as it was when Kuali Student was transferred to Kuali Inc. If so the derivative product would be an open source fully-supported multi-tenancy product as discussed with Chris Coppola.

I was unable to provide Chris with any additional information. We agreed this would be a major step toward a student system. im+m views this opportunity as a way to improve higher education management.

Steps Toward an Open Source Community

Because the Kuali Foundation distributed software is no longer available under the ECL license, one step would be to make ECL software available to the community. There appears to be sufficient copies of the software under the ECL to make an ECL-based distribution of Kuali software feasible. We discussed two alternatives; (1) Add the software distribution function to the Ariah Group. This would assure the community of Ariah's intent. (2) Seek incubation from the Apereo Foundation. Though not discussed because of time limits, another alternative would be to first make the software available via Ariah and, when a community of interest emerges, seek approval as an Apereo incubation project.