

kuali



**STRATEGIC ROLLOUT
MODELS FOR
*KUALI BUILD***

Practical Implementation Strategies and Proven
Best Practices for Digital Transformation

IN THIS GUIDE

I. What Is Kuali Build?

II. Open Enrollment Implementation

III. Iterative Departmental Expansion

IV. Distributed Governance Model

V. Executive Mandate Rollout

VI. Power User Adoption Strategy

VII. IT-Managed Service Model

VIII. Hybrid Rollout With Delegated Access

IX. Autonomous Departmental Rollout

X. Pro Tip: Implement a User-Centered Testing Program

XI. Closing Thoughts

Imagine a campus where forms are automated, data flows seamlessly, and administrative inefficiencies are a thing of the past. This is the reality institutions achieve with Kuali Build.

Dozens of colleges and universities nationwide have harnessed Kuali Build to streamline workflows and drive institution-wide digital transformation. Yet for those entrenched in manual systems—paper forms, PDFs, and legacy approvals—the path forward can feel daunting.

The good news? There's no singular approach to rolling out Kuali Build. Just as workflows can be tailored to specific departments and user needs, implementation can—and should—be adapted to each institution's structure and strategic priorities.

In this guide, we examine eight distinct implementation strategies drawn from real institutions. You'll learn how different rollout models align with institutional goals, foster adoption, and deliver value quickly.



A woman with her hair in a bun, wearing a dark vest over a light-colored shirt, is sitting at a desk and working on a laptop. In the background, other people are working at desks in a bright, modern office environment. The image is partially obscured by a large green shape on the left side of the page.

Kuali

What Is Kuali Build?

Kuali Build is a no-code, cloud-based platform purpose-built for higher education institutions to streamline form creation and workflow automation without writing a single line of code. It strikes a rare balance between simplicity and power, enabling non-technical users to build secure, integrated, and accessible applications that are ready for mobile use and campus-wide scale.



Many institutions face a common dilemma: traditional processes are slow and paper-based, but existing digital solutions fall short. Simple form builders lack compliance and integration support, while low-code platforms (though more powerful) introduce a different problem. They require developer involvement, creating bottlenecks. Every new form, workflow adjustment, or bug fix must go through central IT, resulting in delays and lost momentum at the departmental level.

Kuali Build eliminates that friction. It gives faculty, staff, and administrators direct access to powerful tools that let them move fast—creating, testing, and iterating as needed without waiting for development cycles. Whether it's routing course approvals, automating reimbursements, or onboarding employees, departments can respond to their own needs in real time.

Backed by Kuali's commitment to accessibility, data security, and seamless integration with existing systems, Kuali Build helps institutions accelerate digital transformation and free up central IT to focus on higher-impact initiatives.

OPEN ENROLLMENT *IMPLEMENTATION*

01

As the name suggests, open enrollment introduces Kuali Build to the institution through a campus-wide awareness initiative. Rather than extending invitations to specific users, participation is voluntary—any interested administrative user may begin using the platform without direction from IT or central administration.

Structured training sessions support equitable onboarding across the university, enabling consistent skill development regardless of role or department. This non-prescriptive rollout model encourages interest-led adoption, allowing users to engage based on perceived value and relevance. The result is often a motivated, self-selecting cohort that advances adoption through demonstrated enthusiasm and practical need.

Fresno State University, intent on becoming a fully automated institution, was historically constrained by paper-based forms and fragmented PDF workflows.

Earlier automation efforts depended on developers, limiting participation from non-technical staff. By introducing Kuali Build across the entire campus, Fresno State enabled decentralized ownership of process improvement. Departments independently adopted the platform, accelerating digitization across units. Faculty and staff—those closest to operational friction—were able to resolve issues rapidly without waiting on IT intervention.

“Through Kuali Build, we have redefined automation in higher education, reducing paperwork, simplifying workflows, and improving accessibility for students and staff alike,” said Max Tsai, Director of Planning & Digital Transformation. “By integrating automation with modern technology, we are building a smarter, more connected campus that empowers students, faculty, and staff to focus on what truly matters: learning, innovation, and growth.”





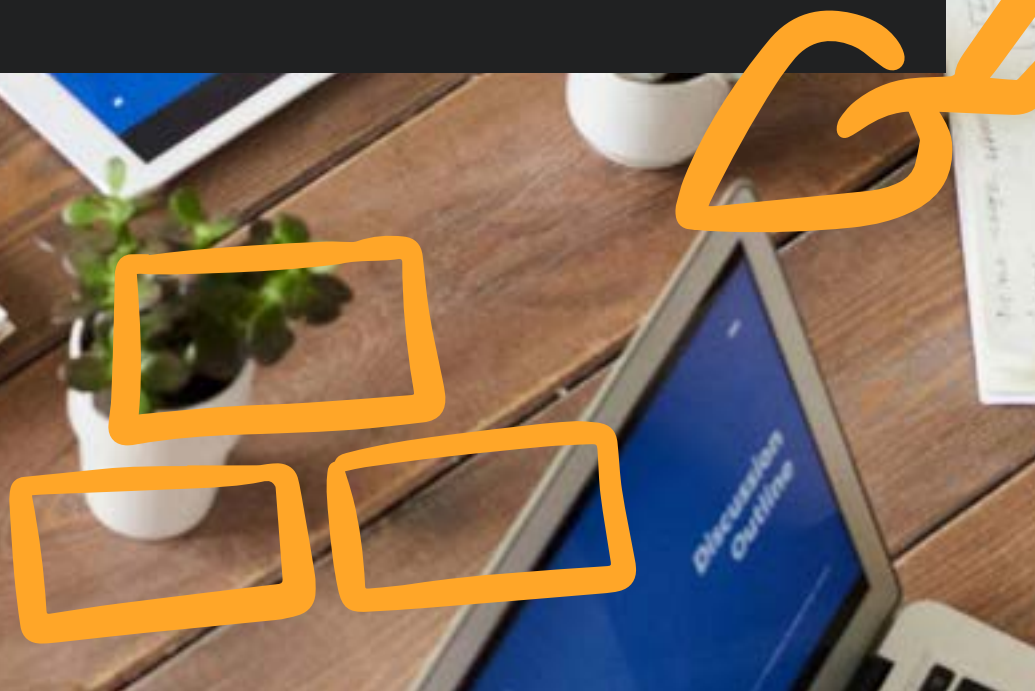
02

ITERATIVE DEPARTMENTAL *EXPANSION*

An iterative departmental rollout begins with a controlled pilot within the IT organization. In this phase, IT users serve as the initial stakeholders, deploying Quali Build to model workflows, establish technical standards, and refine institution-specific implementation guidelines.

Once the platform is stabilized internally, IT extends access to additional departments in sequential phases—often beginning with a single unit or a small cohort. Each phase includes feedback collection, stakeholder training, and targeted support, reinforcing lessons learned from prior iterations.

This strategy favors long-term sustainability over rapid deployment. By anchoring rollout within IT and advancing incrementally, institutions gain several advantages: controlled change management, enhanced process maturity, and training calibrated to each department's operational context. The result is a methodical, low-risk path to enterprise-wide adoption grounded in repeatable implementation cycles.



03

DISTRIBUTED GOVERNANCE *MODEL*

In a distributed, federated rollout strategy, the IT organization provisions dedicated Quali Build workspaces for each department, enabling unit-level autonomy while retaining centralized oversight. This approach empowers departments to configure forms, workflows, and permissions in alignment with their specific operational needs—without compromising institutional governance standards.

Each workspace operates within a shared architectural framework. IT defines baseline templates, access protocols, and training resources, establishing university-wide best practices. Departments retain the flexibility to adapt these standards locally, ensuring Quali Build meets their unique use cases while aligning with enterprise objectives.

This governance model mitigates information drift and reduces the risk of informal knowledge transfer—often described as the “game of telephone”—as the platform expands across campus. By coupling decentralized control with centralized guidance, institutions promote standardization, enforce compliance, and accelerate adoption through empowered ownership at the departmental level.



**GETTYSBURG
COLLEGE**

EXECUTIVE MANDATE ROLLOUT

04

An executive mandate rollout is a top-down implementation model initiated by institutional leadership. In this high-urgency approach—often described as the “burn the boats” strategy—executives commit fully to adopting Kuali Build campus-wide, signaling unequivocal support and removing alternative systems or processes.

With executive sponsorship in place, change can be enacted swiftly and decisively. This model prioritizes rapid onboarding, intensive training, and immediate workflow migration. The emphasis is on pace and scale—leveraging leadership authority to accelerate engagement, remove roadblocks, and standardize usage quickly across departments.

This approach proved effective at Gettysburg College, where the technical team led a full-campus deployment of Kuali Build. Director of Data Systems John Whitehouse and his team focused on capacity-building, helping users not only adopt the platform but grow confident in its potential.

“When you see more people coming forward with it, you realize it’s working, and they see value in it,” said John. “We’re not pushing it on them; it’s organically people stepping forward and wanting to see where Kuali can improve things.”

BENEFITS OF DIGITAL TRANSFORMATION

- 01 **OPERATIONAL EFFICIENCY**
Minimize manual tasks and reduce administrative drag.
- 02 **TRANSPARENCY**
Gain real-time insight into form status, progress, and ownership.
- 03 **COLLABORATION**
Standardize data and workflows across departments.
- 04 **USER EXPERIENCE**
Deliver accessible, easy-to-use forms for staff and students.
- 05 **COST REDUCTION**
Cut time, errors, and paper—reinvest resources in strategic work.



POWER USER *ADOPTION STRATEGY*

05

This structured change management approach identifies and equips early adopters within each department to serve as internal champions. These power users drive localized implementation, promote grassroots enthusiasm, and reduce reliance on IT by providing peer-level guidance and onboarding support.

UC San Diego applied this strategy when transitioning from custom development to Kuali Build. Departments faced a significant backlog of application requests. After testing the platform, Shawn Munroe, SaaS Service Owner, quickly created a functioning app—during a lunch break. That alone confirmed for him that Kuali was the right fit.

Shawn's team introduced Kuali Build as a self-service tool supported by a lean core team that answered questions and offered targeted assistance. They even used Kuali to manage Kuali—tracking use cases, business owners, and application purpose through internal forms. As more users came on board, they explored new ways to extend the platform.

Shawn describes it as a “lightbulb moment” when users recognize Kuali’s full potential. They may start with one objective but soon realize how many processes can be improved. The support team encouraged power users to lead by example, and those individuals began developing a broad range of apps to address departmental needs.

This model allowed the support team to focus on consultative guidance instead of building solutions on behalf of users. With empowered champions in place, adoption scaled rapidly.

One power user, a staff member in academic personnel with no prior technical background, rebuilt 10 forms supporting faculty processes. Her success inspired broader departmental adoption, leading to operational efficiencies campus-wide.

Shawn noted that while power users evangelize Kuali’s potential, it’s the support team—and the Kuali knowledge base—that equips them to succeed. The result is a thriving, decentralized network of engaged Kuali users across UC San Diego.





KEY CAPABILITIES OF KUALI BUILD



No-code, drag-and-drop design



Conditional logic, branching, and dynamic fields



ERP, SIS, and SSO integrations



Automated notifications and approval chains



Secure data tracking, permissions, and audit logs



Role-based access and customizable dashboards



06

IT-MANAGED SERVICE MODEL

In an IT-managed service model, the central IT organization serves as the sole administrator of all Kuali Build development. Departments submit form or workflow requests, but creation and configuration reside exclusively with IT. This centralized governance structure ensures a consistent and tightly controlled implementation of the platform.

The primary advantage of this model is quality assurance. With IT acting as the gatekeeper, each Kuali application is reviewed for compliance with institutional standards, data security protocols, and long-term maintenance considerations. This mitigates risk, prevents fragmented development, and ensures all solutions align with broader enterprise architecture and policy requirements.

While this approach may reduce speed and limit the kind of grassroots innovation seen in more decentralized models, it can be the right choice for institutions with strict governance mandates, resource constraints, or cultural resistance to department-level autonomy. For some universities, especially those with complex data environments or heightened regulatory sensitivity, this structure offers a sense of control and accountability that aligns with institutional risk posture.



07

HYBRID ROLLOUT WITH *DELEGATED ACCESS*

A hybrid rollout model that combines centralized control with distributed enablement. This phased approach begins with IT-led deployment and oversight and gradually transitions to departmental autonomy as users demonstrate proficiency. The hybrid strategy prioritizes initial risk mitigation while laying the groundwork for scalable, distributed adoption.

The University of Connecticut exemplified this approach. Initially, the IT organization used Kuali Build to develop a COVID-19 vaccine declaration system for over 8,700 faculty and staff. With that success, UConn's IT team took ownership of onboarding—training users and emphasizing security, access policies, and platform potential. Early focus centered on the HR department, where paper-based processes were especially burdensome.

However, as adoption grew, it became clear that direct IT involvement in every onboarding cycle was unsustainable. The team transitioned to a self-service model supported by an internal knowledge base, complete with videos, policies, and instructional content. New users now request access by completing a form and agreeing to institutional guidelines—streamlining access while maintaining governance.

Importantly, IT shifted from builders to enablers. They no longer develop apps for departments but remain available to consult and support. With this structure in place, peer-to-peer sharing accelerated adoption. According to Jessica Henderson, Manager for Enterprise Operations, UConn built 204 apps in nine years using developers. Since implementing Kuali Build, campus users have built over 1,200 apps in under three years.

“Comparatively speaking, with simpler business processes, a lot of departments can get off the ground and have great automation of those quickly.”





08

AUTONOMOUS DEPARTMENTAL *ROLLOUT*

At many institutions, technology deployment is delayed due to limited capacity in central IT. To overcome this constraint, some universities adopt an autonomous departmental rollout strategy, where individual units take ownership of Kuali Build adoption. In this decentralized model, departments manage their own implementation and maintenance,

while IT provides minimal oversight focused on integration and governance. This enables faster deployment and tailored configurations aligned with specific operational needs.

At Arizona State University—a multi-campus system operating under shared governance—the Provost's Office led an independent rollout. Katie Jensen, Director of Curriculum Development, partnered with the Kuali team to craft an initial launch framework. Thanks to the platform's intuitive interface and design flexibility, her team was able to configure and deploy Kuali Build without relying on IT.



ARIZONA STATE
UNIVERSITY



“Because of the centralized nature of our university, we wanted something we could refine,” she said. “We needed to customize workflows to be as simple or complicated as they needed to be in our very complex organization.”

The Provost’s Office manages its own forms and workflows, reflecting ASU’s structural nuances within Quali Build. To begin, Katie’s team reviewed existing paper-based forms and consolidated them into a single digital process. Early outcomes included replacing five separate forms with one comprehensive Quali application for curricular actions.

Due to its cross-campus role, the Provost’s Office became an internal showcase for Quali. Departments began reaching out after seeing the tool in action. Staff in the office partnered with each new group to collaboratively build workflows tailored to their needs.

“I get a lot of feedback from users saying how much they like Quali and how much they would like to be able to use it in their departments because they see the value in how we’ve implemented it,” Katie said. “Colleagues see how they can reduce the burden and put processes into Quali Build.”



Southern Connecticut State University also implemented the Autonomous Department Rollout Strategy in similar fashion to ASU. Carol Jenkins, Associate Director for Post-Award, leads a compact team responsible for high-volume tasks. Although the university's IT resources were occupied elsewhere, Jenkins reported that Kuali Build required little hands-on support to succeed.

Kuali is not yet deployed campus-wide, but it has become a daily essential within the Post-Award office, powering workflows for financial aid, funding requests, tuition applications, and payroll.

"We've cut out every email hassle out there. Instead of 45 email threads, it's one form," Carol said.

Because Kuali Build is simple to configure, Jenkins needed no formal IT training. As she introduces the platform to other departments, she receives consistent praise for its usability, visibility, and data access capabilities.

"Kuali has saved us hundreds of work hours. It keeps everyone on the same page with where things are. The organizational aspect and time-saver are huge."

CHOOSING A ROLLOUT STRATEGY

Questions to Align Your Rollout Strategy



Who owns Kuali Build—central IT or distributed teams?



Are campus leaders actively sponsoring the rollout?



What's your timeline: immediate need or phased adoption?



Do you prioritize consistency or flexibility in form design?



Which departments are primed for early impact?



What resources exist to train and support users?



SOUTHERN CONNECTICUT
STATE UNIVERSITY

PRO TIP:

Implement a User-Centered Testing Program

Digital transformation doesn't end with deployment—it matures through iteration. A user-centered testing program ensures that solutions built in Quali Build reflect the real-world needs of the people who use them. By incorporating structured feedback loops, institutions can validate workflows before they launch, reduce user friction, and build stakeholder trust early.

This approach is especially valuable in rollout models where IT, or a central support team, plays a major role in form creation—such as Iterative Departmental Expansion, IT-Managed Service, Hybrid Rollout, or Power User strategies. Testing ensures the “build once, deploy widely” model doesn't miss the mark on usability or clarity.





WHICH STRATEGY IS BEST?

- There's no "right" model—only the one that fits best
- Combine strategies to meet campus needs over time
- Adapt as you grow: rollout strategies evolve with usage
- Leverage governance, champions, or autonomy where appropriate

At Southern New Hampshire University (SNHU), user testing has become a standard part of the form development lifecycle. Mike O'Connor, Director of System Analytics & Communications and Adjunct Faculty in the Office of the University Registrar, emphasized the impact:

"User testing our forms has been a game-changer for SNHU. It has allowed us to identify and resolve pain points before they become roadblocks. The insights we gain ensure our forms are intuitive, efficient, and aligned with the needs of our students and staff."

Inspired by teams like SNHU, Kualu encourages other institutions to take a simple, structured approach to user testing. It doesn't need to be formal or complex. Create a test plan, define success criteria, and involve a few representative users—ideally, those who will actually use the form in their day-to-day work. Have them walk through realistic tasks like "submit a leave request" or "complete a funding form," and ask them to think aloud while interacting.

After each session, review what went well and where users stumbled. Were field labels confusing? Was the form too long? Did branching logic behave as expected?

These insights allow teams to refine and simplify forms before campus-wide rollout. Institutions that adopt this feedback-driven approach tend to see stronger adoption, fewer support requests, and greater confidence in their digital processes.

CLOSING THOUGHTS

Rolling out new technology isn't a matter of flipping a switch—it's a strategic process grounded in planning, alignment, and adaptability. As this guide illustrates, there are multiple ways to successfully implement Kuali Build. The key is selecting a rollout model (or combination of models) that reflects your institution's structure, culture, and readiness.

Whether you're starting with a single high-impact form or launching a campus-wide initiative, the principles remain the same: start with clarity, engage stakeholders early, and remain flexible as needs evolve. Kuali's implementation team has partnered with universities of all sizes to support thoughtful, sustainable rollouts—and we're ready to help you do the same.

To learn more, explore our customer case studies, attend Kuali Days, or reach out to your Kuali representative to start planning your rollout.

LEARN MORE FROM KUALI USERS

Want to learn more from our coast-to-coast university success stories? [Check out case studies](#) and resources here and sign up for an upcoming Kuali Days.





KUALI
BUILD