



A Holistic Approach to All Resource Planning (ARP) at Notre Dame

2018 ACC Fiscal Officer's Conference
April 30, 2018



INTRODUCTIONS

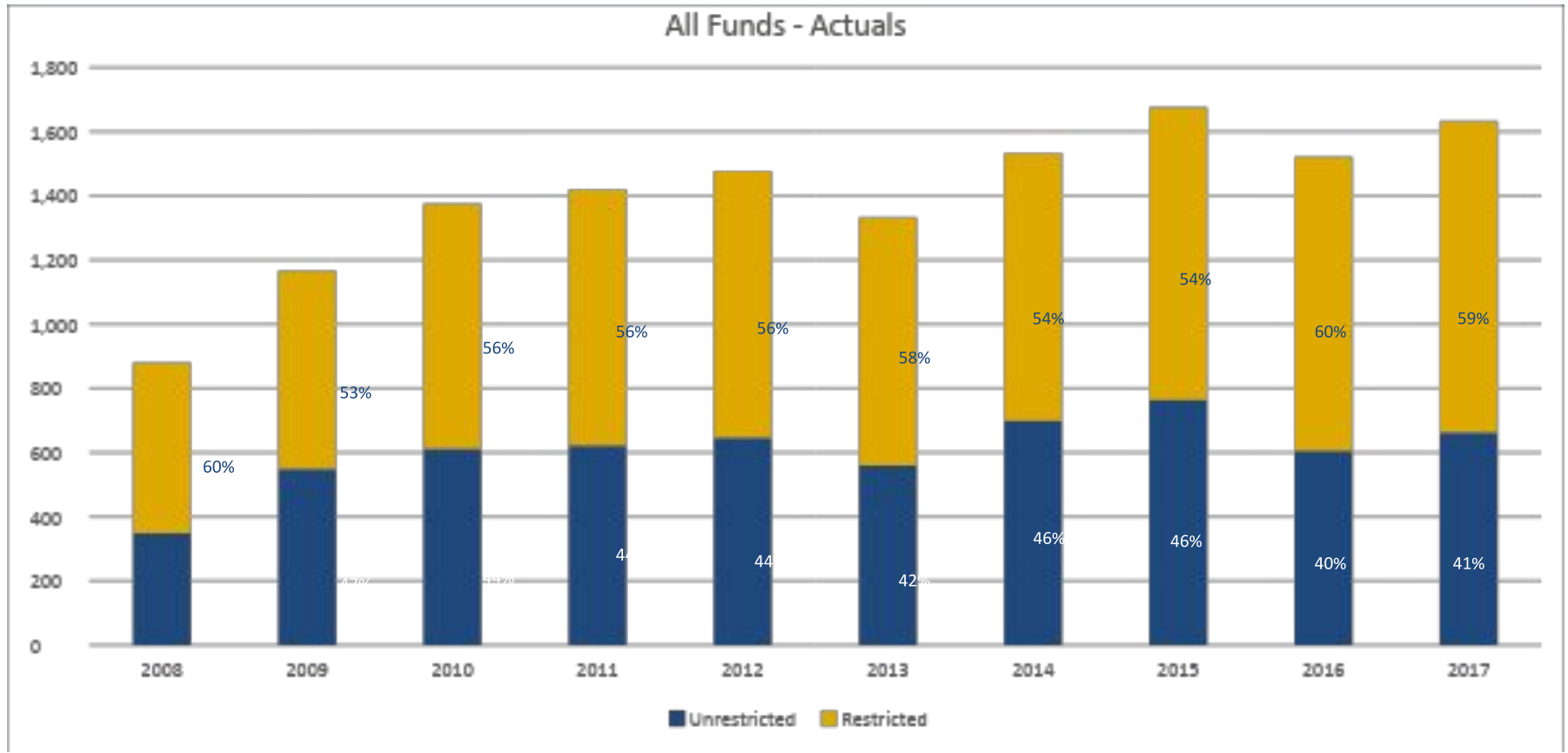
Agenda

1. University Financial Background
2. What is ARP at the University of Notre Dame
3. History of ARP
4. The Tool: Host Analytics
5. Overview of the Cycles of Planning
6. Next Phase: Multi-Year Planning
7. Host Application Demonstration
8. Questions

University of Notre Dame Financial Background

- Founded in 1842
- Undergrad. Enrollment: ~8,600 students over 6 College/ Schools
- Graduate School: ~2,200 students across 4 divisions (Engineering, Humanities, Science, & Social Science)
- Annual Operating Budget FY18: ~\$1.6 billion

All Fund Resources – Notre Dame



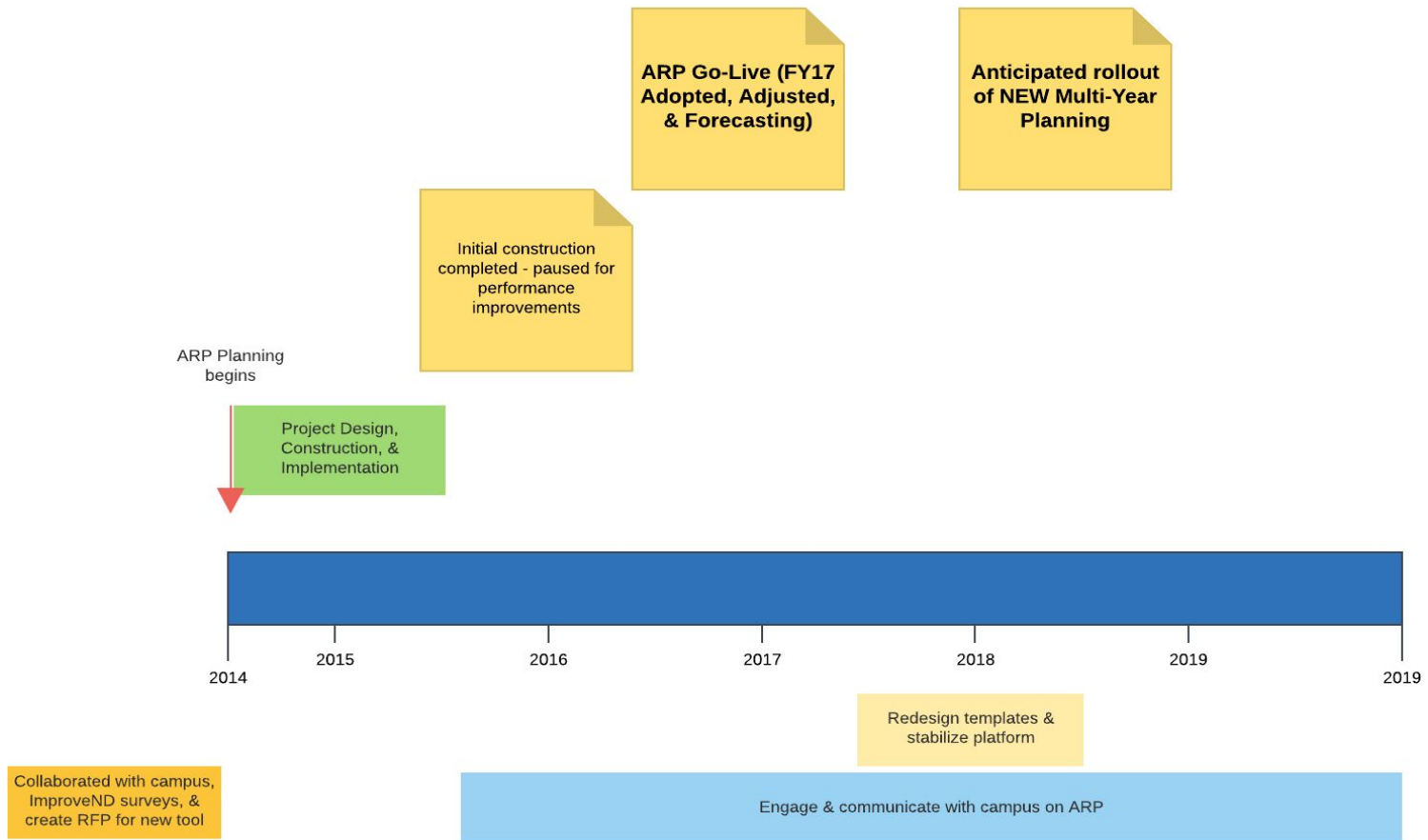
ARP: WHAT IS ARP AT THE UNIVERSITY OF NOTRE DAME?

What is ARP at Notre Dame?

- All Resource Planning (Unrestricted & Restricted Budgets)
 - Distributed to campus: ~300 active user accounts
- Forecasting for Current Fiscal Year
- Robust reporting with ability to combine historical trends with current and future year projections
- **COMING SOON:** Multi-Year forward-looking tool

HISTORY OF ARP AT NOTRE DAME

ARP Project Timeline

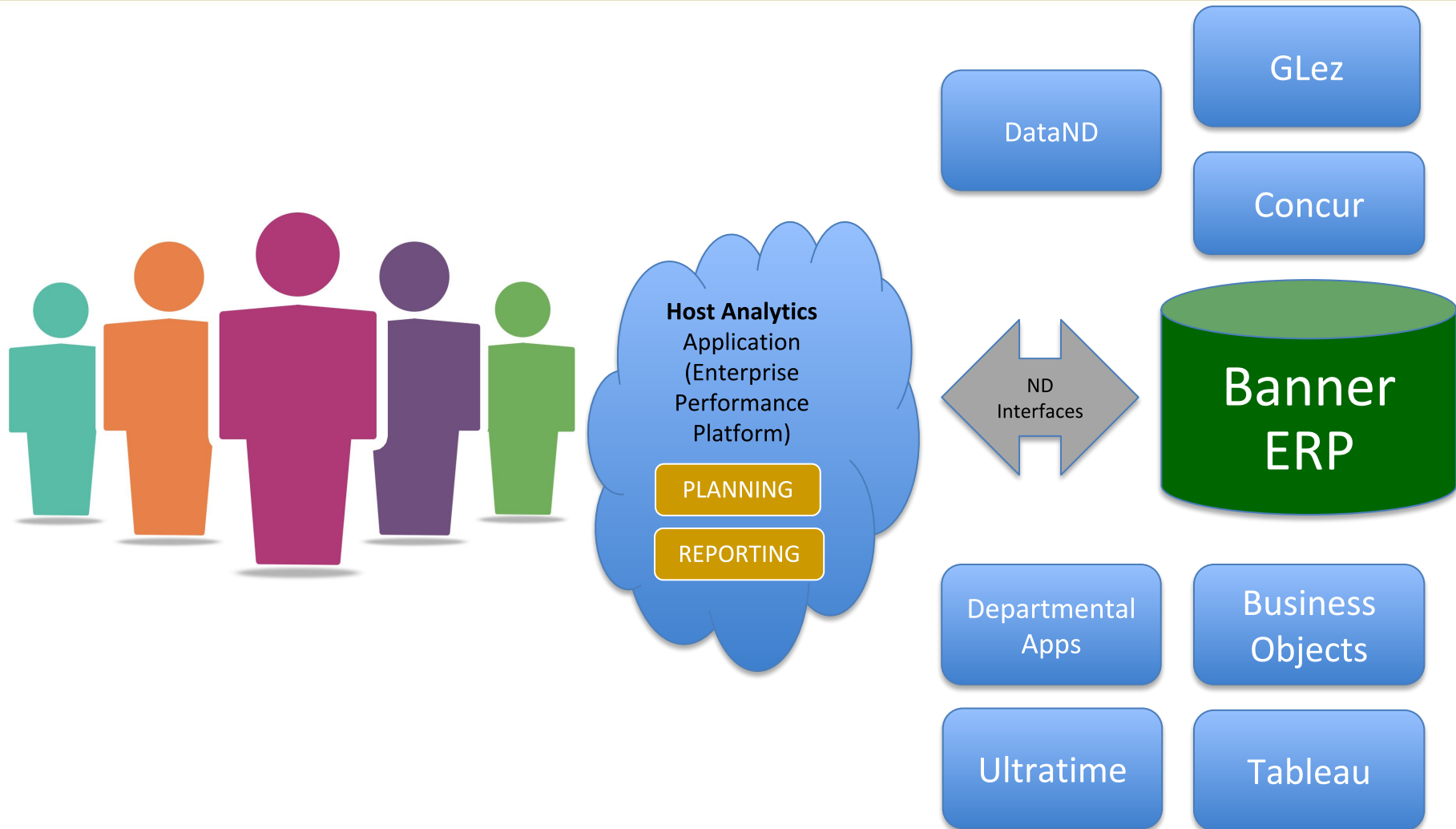


ARP Roles for Key Campus Stakeholders

- **Budget Office**
 - Overall Product Owner
 - Budgeting
 - Integration Architect
 - Reporting
- **Controller's Office**
 - Security & Access Management
 - External Reporting
- **Human Resources**
 - Jobs Product Owner
- **Office of the Provost**
 - Primary Stakeholder/Subject Matter Expert
- **OIT**
- **Academic Units**
 - College of Arts & Letters
 - College of Business

THE TOOL: HOST ANALYTICS

Host Analytics @ Notre Dame

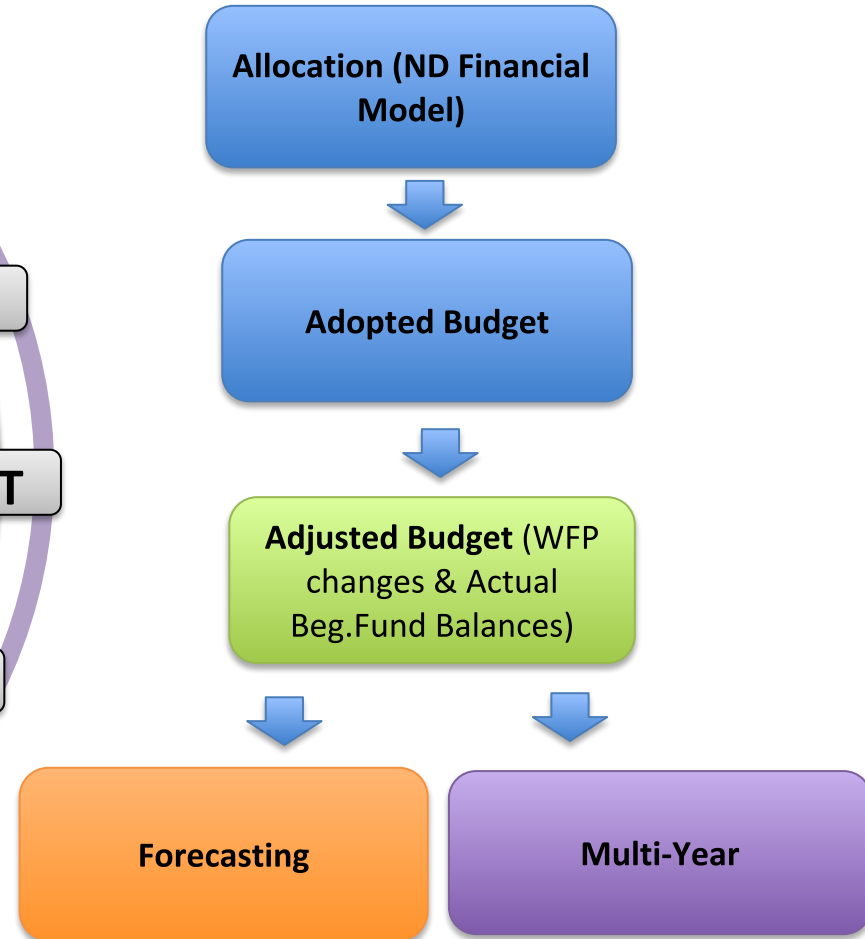
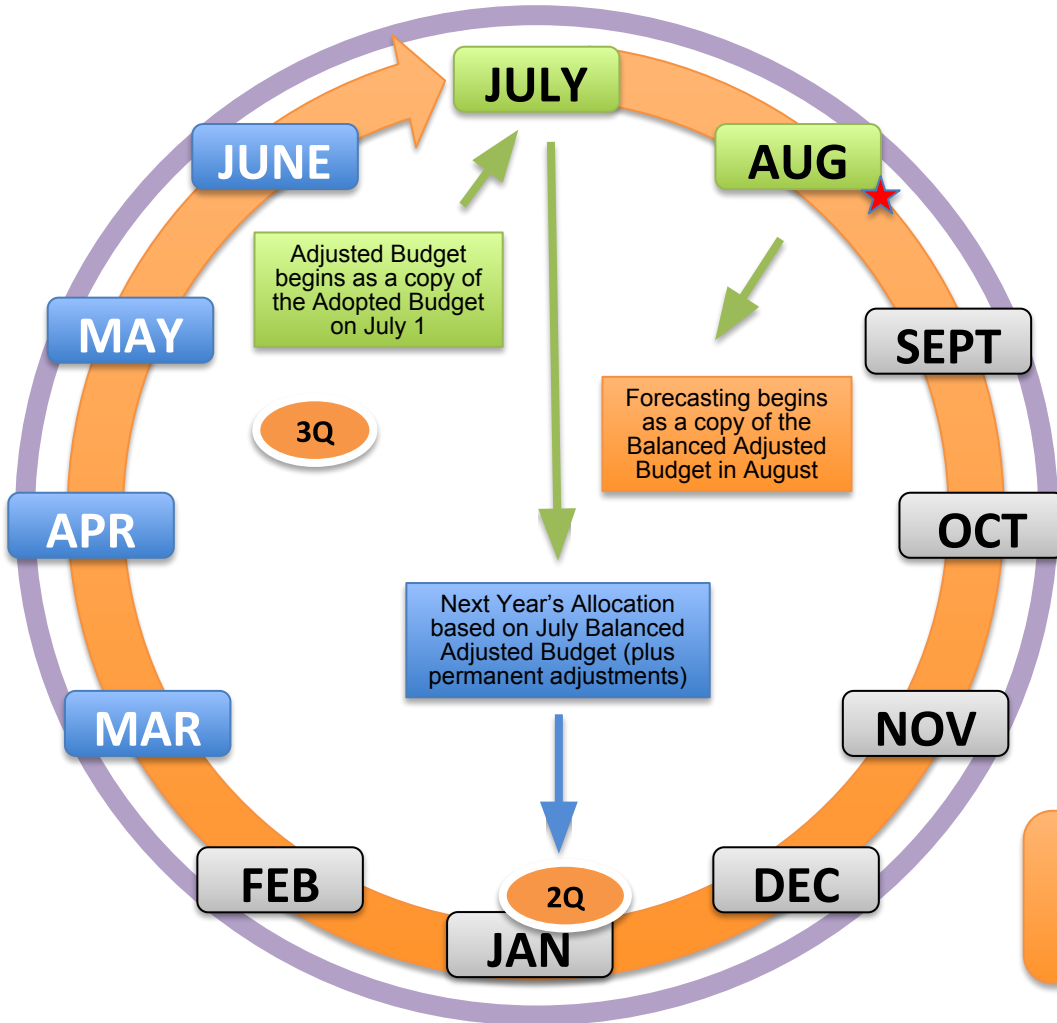


Unique Challenges in ARP at Notre Dame (& Higher Education)

- Truncated Chart of Accounts
- Unrestricted Allocation/ Contribution calculation
- Fund Transfers (Funding commitments)
- WFP separation between faculty/ staff (unique processes with different timelines)
- Targeted increment allocations (ex. Faculty & staff positions)
- Beginning Fund Balances (Balance Sheet accounts translation)
- Central Office/ Business Unit roles & responsibilities
 - Training
 - Change Management

OVERVIEW OF THE CYCLES OF PLANNING

ARP Planning Processes



NEXT PHASE – MULTI-YEAR PLANNING

Anticipated Approach to Multi-Year

- Forward-looking planning tool
- Utilize “base” year budget & apply targeted high-level growth factors to project next 5-years of data
- Ability to adjust/ append financial plans over future years
- Ability to plan for new programs without the use of existing chart structure
- Long term goal to utilize multi-year planning to supplement annual budget discussions

HOST DEMONSTRATION – EXAMPLES HOW THE ACADEMY UTILIZES ARP

QUESTIONS?
