An Overview: Responsibility Center Management (RCM)

Treasurer’s Town Hall
December 15, 2014
# Common University Budget Models

<table>
<thead>
<tr>
<th>EVERY TUB ON ITS OWN BOTTOM</th>
<th>INCREMENTAL</th>
<th>FORMULA-BASED</th>
<th>RESPONSIBILITY CENTER MANAGEMENT</th>
</tr>
</thead>
<tbody>
<tr>
<td>- Budget model in which each school acts as an independent entity responsible for its own management and funding with minimal concern about the university as a whole</td>
<td>- Budget model in which budget allocations are based upon the funding levels of the previous year and possibly increased by a set percentage</td>
<td>- Budget model in which budget allocations are based on pre-determined formulas</td>
<td>- Budget model in which each unit is financially responsible for activities and held accountable for direct and indirect expenditures with strategic investments by academic leadership to advance the university or local/regional as a whole</td>
</tr>
</tbody>
</table>
Similar Budget Issues At Other Universities

Source: University of Virginia – University Financial Model Presentation (6/24/2014)
Responsibility Center Management

• A budget model promoting financial responsibility at a unit level

• Works most effectively in an environment of transparency and accountability

• RCM is a tool – academic leaders have responsibility for using the system to advance the missions of the University
Current Budget Model

• All Funds Budgeting (AFB) was instituted at Rutgers in 2005
• AFB is a modified version of RCM where flat overhead on tuition and F&A is used to support the local/regional administration and system-wide administration costs not directly budgeted to the schools
• Legacy UMD units are on an RCM type model but different from AFB
New Budget Model

• The new RCM model will replace both the AFB flat overhead on revenues and UMD’s current allocation methodology with more nuanced assessments to allocate costs to schools based on metrics that mirror usage.
How Does RCM Work?

Revenues are credited to the Responsibility Center that generates them.

Revenues:
- Tuition and Fees
- F&A Return
- Other Income

Responsibility Centers:
- Schools
- Research Centers
- Auxiliaries

Direct & Indirect Costs:
- Direct Expenses
- System-wide Support Units
- Local/Regional Support Units

Schools must then pay for their direct expenses as well as a share of the expenses to fund the Support Units.
Do Other Schools Use RCM?

- RCM was created at University of Pennsylvania in the early 1970’s as a response to a financial crisis.

- In the 1980’s schools such as U of Southern California and the U of Toronto also developed RCM budget models.

- Now many public and private universities have converted to RCM – Indiana U, Michigan, Iowa State, U of Minnesota, Syracuse, U of Florida, etc.
Why Switch to RCM?

Academically Centered - “Academics over Economics”

Provides schools with better data, more control, and greater flexibility over resource decisions

Increased accountability and transparency

Greater focus on long-range strategic planning

RCM enables understanding of “ROI” and priority decisions given limited resources
Allocation of Costs

**System-wide**

Costs that are incurred by system-wide support units providing services to all

**Local/ Regional**

Costs that are incurred by support units providing services at the local/ regional or chancellor level
Allocation of Costs
System-wide Cost Pools

- General Administration
- Academic and Student Support
- Debt Service
- Utilities
- Operations and Maintenance
- Information Technology
- Libraries
- Research Support
Metrics for Allocation of Costs

- Once the cost pools have been developed, they need to be allocated to the schools using a metric that best measures the activity.

- The metrics used should be based on “best practices”, verifiable, easy to understand, and uniform.

- Our model includes the following metrics: Unit Expenditures; Net Assignable Square Footage; Enrollment & Tuition data; F&A Return data; and Faculty & Staff FTE.
RCM Concerns and Realities

Concern

• Those academic units that do not have enough revenues to cover their direct and indirect costs will be eliminated

Reality

• One of the benefits of RCM is that it highlights the full costs to operate schools and allows for informed discussions as to the level of subvention given above and beyond earned revenues
RCM Project Committee Structure

RCM Steering Committee
- Chancellors
- SVP for Finance
- SVP for Administration

RCM Advisory Committee
- Faculty
- Deans
- Vice Presidents
- University Senate representatives

RCM Technical Committee
- Key unit administrators from across the university
Time Frame

DESIGN (FY13)
- Read available RCM literature and researched RCM models at other universities
- Determined indirect cost pools and developed methodologies to allocate these costs to the revenue generating responsibility centers

PREPARATION (FY14)
- Advisory committees formed to discuss preliminary RCM budget model
- Develop preliminary budget model
- RCM budget model is continually refined and fine tuned based on committee feedback

TRAINING & TRIAL RUN (FY15)
- Training will be provided through information sessions, small focus groups, hands on computer labs, and documentation
- A trial run of RCM will be implemented on paper and run parallel to AFB
- Assumptions will be tested and “tweaks” made

FULL IMPLEMENTATION (FY16)
- RCM will be fully integrated into the general ledger
Hyperion Financial Management (HFM) and Reporting Project

Treasurer’s Town Hall
December 15, 2014
Hyperion Financial Management (HFM) Project Goals

Standardize reporting across the University System including RCM Reporting

- Consolidate external and management reports
  - Feed data from Banner and RIAS (Oracle) into HFM to produce consolidated enterprise-wide reports as well as unit-based management reports
- Define a new consolidated chart of accounts (all segments & values)
  - Initially, to be used within HFM to consolidate Oracle and Banner financial results
  - In the future, to be used University-wide as part of the ERP re-implementation
- Develop the crosswalk between the existing general ledgers and the new COA
- Align monthly financial closing processes for consistency

Reduce or eliminate the need for existing shadow systems
Account Code Combination

- **Unit (RC)**: 3
- **Location**: 3
- **Org**: 4
- **Fund Type**: 3
- **(Natural) Account**: 5
- **Business Line**: 4
- **Activity**: 4
- **Future**: 5

Project 123
Definitions

• **Unit (Responsibility Center Groupings):** School, Institution, Center and/or Central Unit

• **Location:** The physical area where the revenue and/or costs were incurred including on-site, off-site, online, and foreign locations

• **Organization (Department):** A business area which owns people and space.

• **Fund Type:** The funding source used to acquire goods and services

• **Account:** Revenue and expenditure types that are the equivalent of our current natural accounts (i.e. tuition, salaries, supplies, etc.)
Definitions

• **Business Line:** To identify the specific line of business (or mission) being offered. Examples of high level values are:
  - Instructional (undergraduate, graduate, professional, etc.)
  - Research
  - Healthcare
  - Public Service
  - Other

• **Activity:** To identify total activity of high-level, interdisciplinary and strategic initiatives that span across multiple responsibility centers/units
Next Steps

- Relationship to RCM
- Hyperion Planning/Budgeting Project
- ERP Reimplementation Plans
- Questions
Purposes:

• The merger with UMDNJ necessitates a migration to a single Enterprise Resource Planning (ERP) platform.

• University-wide efficient, effective, and responsive business practices and systems is a foundational element of the Rutgers Strategic Plan and a way to provide real savings for strategic initiatives.

• The University’s move to a Responsibility Center Management budgeting approach that requires changes to budget processes and supporting infrastructure.

• The University must provide reliable and accessible information to our academic and administrative leadership.
Project Steps:

1. **Project Kickoff** – Confirm objectives, scope, timeline, and milestones of project

2. **Transformation Strategy Development** – Develop set of transformation guiding principles; identify high-level change inhibitors (*change readiness*) that must be addressed; develop project communication plan; appoint working committee

3. **Vision Focused Requirements Development** – Conduct stakeholder workshops, surveys and interviews to gather information on business processes and needs assessments for the future state. Approach from a process viewpoint, not a systems viewpoint.  
   *Additional interview sessions were required due to demand*

4. **Develop Gap Analysis** – Compare future state needs with functionality available in RU and UMDNJ systems; draft gap analysis and gap fulfillment recommendations and cost estimates. Question: “Do we really need this?”

5. **Develop Strategy for Future State ERP Solution** – Data migration and conversions, interfaces, timeline, and resource requirements; must be actionable and cost effective. Strategy forming based on Oracle applications for Finance/HR; interim plan for HR/Payroll to migrate RBHS employees. SIS selection RFP out shortly.

6. **Design Infrastructure Improvements** – Address key issues in networking, administrative computing environments, and desktop applications/management. Work underway on networking; other areas in planning or early execution stages
**SIS Project Considerations**

- Requirement-gathering for RBHS complete, adding to RU ones from 2012

- Requirements prioritized by student service leaders – report due on 11/19

- Requirements will roll into software RFP to assess Banner vs. Oracle vs. Workday in December, followed by an RFP for implementation assistance

- Significant risk in existing system for RU – age of legacy system and “unfriendly” nature of the services

- HIGHLY dependent on improved business processes
**Fit/Gap Project Conclusions**

- **Finance/HR: Standardize on Oracle’s Finance/HR Solutions + Select Best-of-Breed for Certain Functions**
  - No significant “gaps” in required or desired functionality
  - Working with Oracle officials to determine “roadmap” – on which version would Rutgers go live?
    - Addition of critical functions like Project/Grants Accounting and Position Management
  - Cloud-based – reduces IT dependency, promotes standard practices,
    - Will Oracle be ready for its critical higher education functions?
  - Interim upgrades and applications?
    - Moving RBHS-Banner employees to a “vanilla” PeopleSoft platform as agreements with unions on standardizing payroll definitions are obtained
    - Financial Reporting and Budget/Planning (Hyperion suite)
    - Costing information (RFP on the street now)
  - “Marketplace” front-end for Procurement (SciQuest now in place for RBHS) and related technology
    - Could be implemented early, aligned with new expense management software
  - Best-of-breed package for Sponsored Projects Pre-award functions
    - In implementation now – aligning with Sponsored Projects process review
**Organizational Design and Business Process Review**

In order for the consolidated Rutgers to benefit from this project:

- Administrative business processes need to be reviewed and updated to reflect the “right practices” suggested by the “vanilla” configurations of the Oracle applications.

- New organizational designs for service functions are critical to *eliminate duplicative efforts* (departments, schools, central), *improve quality*, *reduce “touches”*, and *enhance customer service*.

- Improved business processes *not dependent* on technology must go into effect asap.

- Org Design and Business Process Review:
  
  - Procurement recommendations – reorganizations and RFPs for strategic sourcing, technology, and procurement options.
  
  - Sponsored Projects review began last month.
  
  - HR/Payroll process review planning underway.
  
  - Financial Aid and other student service functions to commence soon.

- Change management tasks are essential to achieve success.
Next Steps

- **Recruit** a Project Executive and dedicated resources for: *project management, communications, change management, and training*
- **Continue and accelerate** organizational and business process reviews, particularly in HR/Payroll and Student Services functions.
- **Issue** RFP for Student Information System incorporating requirements from the Fit-Gap Project (incorporating RBHS needs), issue software RFP, make selection
- **Complete** the “versioning” exercise for needed modules in Finance/HR
- **Plan** the implementation project with realistic budgets, timelines, dependencies, *impact of competing IT priorities*, and staffing plans (internal and consulting).
- **Determine** projects for interim upgrades or transitions
- **Execute** IT infrastructure initiatives in advance of the HR/FIN implementation
- **Design** a comprehensive *business intelligence* and *reporting* strategy – including selecting reporting tools – *prior* to the start of HR/FIN project.
Final Thoughts

• Rutgers can pursue fixed scope / fixed cost implementation projects and anticipate success if it:
  • Creates a tight control of project scope;
  • Redesigns and implements key business processes and organizational structures; and
  • Deploys a strong and dedicated Project Office and team

• Executive management must reinforce that the selection and implementation of new HR/FIN and Student Information systems will have:
  • The full support of management for the project and for the organizational and business process changes;
  • Appropriate levels of funding (including on-going post-live operations), support, and resources to match the original intent; and
  • Dedicated change management, reporting, and training efforts
Questions?
An Overview: Responsibility Center Management (RCM)

School of Arts and Sciences Town Hall
February 25, 2016
Responsibility Center Management

• A budget model promoting financial responsibility at a unit level

• Works most effectively in an environment of transparency and accountability

• RCM is a tool – academic leaders have responsibility for using the system to advance the missions of the University
Why Switch to RCM?

- Academically Centered - “Academics over Economics”
- Provides schools with better data, more control, and greater flexibility over resource decisions
- Greater focus on long-range strategic planning
- RCM enables understanding of “ROI” and priority decisions given limited resources

Increased accountability and transparency
How Does RCM Work?

Revenues are credited to the Responsibility Center that generates them.

Schools must then pay for their direct expenses as well as a share of the expenses to fund the Support Units.
Rutgers Financial Organization under RCM

Units fall into one of two categories within the budget structure:

- **Responsibility Centers** generate revenues for the university and are responsible for paying for all direct and allocated costs

- **Cost Centers** provide services to and are funded by the Responsibility Centers
# New Brunswick Responsibility Centers

<table>
<thead>
<tr>
<th>Instruction</th>
<th>Centers and Institutes</th>
<th>Auxiliaries</th>
</tr>
</thead>
<tbody>
<tr>
<td>Bloustein</td>
<td>AES</td>
<td>Athletics</td>
</tr>
<tr>
<td>GSAPP</td>
<td>Alcohol Studies</td>
<td>Dining</td>
</tr>
<tr>
<td>GSE</td>
<td>Confucius Institute</td>
<td>Student Affairs</td>
</tr>
<tr>
<td>MGSA</td>
<td>DIMACS</td>
<td>Univ Housing</td>
</tr>
<tr>
<td>SAS</td>
<td>Eagleton Institute</td>
<td>Univ Student &amp; Rec Ctrs</td>
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<tr>
<td>SCI</td>
<td>HGINJ</td>
<td>University Press</td>
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<tr>
<td>SEBS</td>
<td>IAMDN</td>
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<tr>
<td>SMLR</td>
<td>IWL</td>
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<tr>
<td>SoE</td>
<td>LSM</td>
<td></td>
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<tr>
<td>SSW</td>
<td>NHETC</td>
<td></td>
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<tr>
<td>Prof Science Masters</td>
<td>Proteomics</td>
<td></td>
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<tr>
<td></td>
<td>Waksman</td>
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</tbody>
</table>
Allocation of Costs
System-wide Cost Pools

- General Administration
- Academic and Student Support
- Debt Service
- Utilities
- Operations and Maintenance
- Information Technology
- Libraries
- Research Support
Allocation of Costs

**System-wide**
Costs that are incurred by system-wide support units providing services to all

**Local/ Regional**
Costs that are incurred by support units providing services at the local/regional or chancellor level
Cost Centers (University and New Brunswick)

<table>
<thead>
<tr>
<th>University-Wide</th>
<th>New Brunswick Local</th>
</tr>
</thead>
<tbody>
<tr>
<td>Academic Labor Relations</td>
<td>Chancellor’s Office</td>
</tr>
<tr>
<td>DOCS</td>
<td>Graduate School-New Brunswick</td>
</tr>
<tr>
<td>Enrollment Management</td>
<td>Honors College</td>
</tr>
<tr>
<td>ERM, Ethics and Compliance</td>
<td>ROTC Airforce, Army, and Navy</td>
</tr>
<tr>
<td>External Affairs and Communication</td>
<td>SVPAA (New Brunswick portion)</td>
</tr>
<tr>
<td>Facilities</td>
<td>Undergraduate Academic Affairs</td>
</tr>
<tr>
<td>Finance</td>
<td>Zimmermanli Art Museum</td>
</tr>
<tr>
<td>GAIA</td>
<td></td>
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<tr>
<td>General Counsel</td>
<td></td>
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<tr>
<td>Human Resources</td>
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<tr>
<td>Institutional Research</td>
<td></td>
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<tr>
<td>Libraries</td>
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<tr>
<td>OIT</td>
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<tr>
<td>President</td>
<td></td>
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<tr>
<td>Public Safety</td>
<td></td>
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<tr>
<td>Research and Economic Development</td>
<td></td>
</tr>
<tr>
<td>RU Foundation</td>
<td></td>
</tr>
<tr>
<td>SVPAA (University-wide portion)</td>
<td></td>
</tr>
<tr>
<td>University Secretary</td>
<td></td>
</tr>
</tbody>
</table>


Metrics for Allocation of Costs

- The cost pools are allocated to the schools using a metric that best measures the activity.

- The metrics are based on “best practices”, verifiable, easy to understand, and uniform.

- Our model includes the following metrics: Unit Expenditures; Net Assignable Square Footage; Enrollment & Tuition data; F&A Return data; and Faculty & Staff FTE.
All Funds Budgeting Revenue & Expense Distribution

Earned Revenues and State Appropriation

- School Requests
- Space/O&M/Utilities
- Central Units (Univ & Campus)
- Central (45% tuition, 50% F&A, historical approp)

Schools (55% tuition, 50% F&A, historical approp)

School Operations
School Reserves
RCM FY16 Revenue & Expense Distribution (RU-NB)

- RCs Subvention
- Strategic Initiatives
- Distrib to RCs based on students/research**

Earned Revenues and State Appropriation

- Chancellor (100% approp 1.5% ER*)
- Schools (97% tuition and F&A)

- School Operations
- Central Alloc Costs (Univ & Campus)
- School Reserves

*ER = earned revenues; another 1.5% goes to the President for strategic initiatives
**Distributed only to RCs that are not self-supporting under the RCM model
<table>
<thead>
<tr>
<th>REVENUES</th>
<th>New Brunswick FY16 Budget</th>
<th>% of Total Revenues</th>
</tr>
</thead>
<tbody>
<tr>
<td>UNRESTRICTED</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Tuition and Fees</td>
<td>$ 604,118,168</td>
<td>35%</td>
</tr>
<tr>
<td>State Appropriations</td>
<td>$ 198,013,570</td>
<td>12%</td>
</tr>
<tr>
<td>F&amp;A Costs Recovered</td>
<td>$ 50,441,868</td>
<td>3%</td>
</tr>
<tr>
<td>Auxiliary</td>
<td>$ 309,775,042</td>
<td>18%</td>
</tr>
<tr>
<td>University Support</td>
<td>$ (0)</td>
<td>0%</td>
</tr>
<tr>
<td>Other</td>
<td>$ 198,115,890</td>
<td>12%</td>
</tr>
<tr>
<td>TOTAL UNRESTRICTED</td>
<td>$ 1,360,464,538</td>
<td>79%</td>
</tr>
<tr>
<td>RESTRICTED</td>
<td>$ 352,758,487</td>
<td>21%</td>
</tr>
<tr>
<td>HEALTHCARE</td>
<td>$ -</td>
<td>0%</td>
</tr>
<tr>
<td>TOTAL REVENUES</td>
<td>$ 1,713,223,026</td>
<td></td>
</tr>
</tbody>
</table>
# FY 2016 BUDGET

## New Brunswick Campus Summary

<table>
<thead>
<tr>
<th>EXPENSES</th>
<th>New Brunswick FY16 Budget</th>
<th>% of Total Expenses</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>DIRECT EXPENSES</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Unrestricted</td>
<td>$ 951,609,597</td>
<td>56%</td>
</tr>
<tr>
<td>Restricted</td>
<td>$ 352,758,487</td>
<td>21%</td>
</tr>
<tr>
<td>Healthcare</td>
<td>$ -</td>
<td>0%</td>
</tr>
<tr>
<td><strong>TOTAL DIRECT EXPENSES</strong></td>
<td>$ 1,304,368,084</td>
<td>76%</td>
</tr>
<tr>
<td><strong>INDIRECT (COST POOL) EXPENSES</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Academic Support</td>
<td>$ 69,135,821</td>
<td>4%</td>
</tr>
<tr>
<td>Debt Service</td>
<td>$ 38,349,374</td>
<td>2%</td>
</tr>
<tr>
<td>Facilities O&amp;M</td>
<td>$ 37,533,583</td>
<td>2%</td>
</tr>
<tr>
<td>General and Administrative Service</td>
<td>$ 70,907,283</td>
<td>4%</td>
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<tr>
<td>Information Technology</td>
<td>$ 23,030,774</td>
<td>1%</td>
</tr>
<tr>
<td>Libraries</td>
<td>$ 15,566,865</td>
<td>1%</td>
</tr>
<tr>
<td>Research Support</td>
<td>$ 9,033,265</td>
<td>1%</td>
</tr>
<tr>
<td>Strategic Funds</td>
<td>$ 25,855,999</td>
<td>2%</td>
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<tr>
<td>Student Service</td>
<td>$ 3,345,437</td>
<td>0%</td>
</tr>
<tr>
<td>Utilities</td>
<td>$ 37,311,481</td>
<td>2%</td>
</tr>
<tr>
<td><strong>TOTAL INDIRECT (COST POOL) EXPENSES</strong></td>
<td>$ 330,069,883</td>
<td>19%</td>
</tr>
<tr>
<td>ADJUSTMENTS (Transfers &amp; Contigencies)</td>
<td>$ 120,167,648</td>
<td>7%</td>
</tr>
<tr>
<td><strong>TOTAL EXPENSES</strong></td>
<td>$ 1,754,605,615</td>
<td>102%</td>
</tr>
<tr>
<td>COST POOL ALLOCATION</td>
<td>$ (28,857,322)</td>
<td>-2%</td>
</tr>
<tr>
<td>STRATEGIC FUNDS</td>
<td>$ (12,525,268)</td>
<td>-1%</td>
</tr>
<tr>
<td><strong>TOTAL NET EXPENSES</strong></td>
<td>$ 1,713,223,025</td>
<td></td>
</tr>
</tbody>
</table>

**NOTES:**
- State paid fringe benefits and Federal/State student aid are shown at the campus level
- University Support consists of state appropriation and other President/Chancellor revenues
## FY 2017 Budget Calendar

<table>
<thead>
<tr>
<th>Task</th>
<th>Dates</th>
</tr>
</thead>
<tbody>
<tr>
<td>Budget meetings with heads of central University cost pool areas</td>
<td>November 2015-February 2016</td>
</tr>
<tr>
<td>Preliminary cost pool allocations</td>
<td>March 2016</td>
</tr>
<tr>
<td>Responsibility center budget preparation and Chancellor review</td>
<td>March 2016-May 2016</td>
</tr>
<tr>
<td>Preliminary budget presentation and tuition and fee proposals to Board F&amp;F committee</td>
<td>June 2016</td>
</tr>
<tr>
<td>Tuition and fee rate approvals by RU board and state appropriation allocations set by legislature</td>
<td>July 2016</td>
</tr>
<tr>
<td>Final budgets set for all RU units</td>
<td>July 2016</td>
</tr>
</tbody>
</table>
Business Process and Organizational Review Projects

In order for the consolidated Rutgers to benefit from this project:

- Administrative business processes need to be reviewed and updated to reflect the “right practices” suggested by the “vanilla” configurations of the Oracle and other applications.
- New organizational designs for service functions are critical to eliminate duplicative efforts (departments, schools, central), improve quality, reduce “touches”, and enhance customer service. Improved business processes that are not dependent on technology must go into effect immediately.

Assessment and implementation of organizational alignment and business process improvement across the following areas:

- Research Administration
- University Procurement
- Controller’s Office
- Budget Office
- Student – Enrollment Management and Student Accounts
- Human Resources / Payroll
Administrative Systems Projects (Phase 1 to Phase 4)

- **Financial Management**
  - Implement a single Oracle Cloud Financial System that incorporates the needs of both legacy RU and legacy UMDNJ schools, centers and central units currently using Oracle and Banner Systems, with redesign of chart of accounts

- **Budget and Financial Planning**
  - Update the Hyperion Planning application to accommodate the new RCM budget model for FY17 budget process and new chart of accounts structure

- **Cost Management**
  - Implement a University costing management model to answer key questions around revenues, expenses and margins

- **Procurement**
  - Implement automated, university-wide purchasing, accounts payable and expense management tools to streamline and expedite processes at the University, utilizing SciQuest and Oracle

- **Human Resources/Payroll**
  - Migrate employee records on Banner HR/payroll system into existing Rutgers hosted Peoplesoft System in preparation for ultimate migration to Oracle Cloud HCM Solution

- **Research Administration**
  - Implement a series of systems improvements to enable efficiencies in research administration functions for both faculty and staff

- **Student**
  - Selection of a single student information system to be implemented across the University
Phase 1 Projects

Phase 1 administrative systems projects include:

1. General Ledger and Project/Grant Accounting, including Redesign of Chart of Accounts
2. Procure-to-Pay and Expense Management
3. Human Resource/Payroll – RBHS Employee Migration to PeopleSoft
4. Budget and Financial Planning – common Hyperion budgeting tools

The original go-live date for the first three items has been July 1, 2016, is being moved to October 1, 2016.

The budget planning tool (item 4) is live now for cost centers and will be live for responsibility centers on schedule by March 10, 2016.
Stakeholder Engagement

Stakeholder engagement at multiple levels throughout the organization.
Change Management

Stakeholder Engagement
• Role of Business Advisory Groups:
  – Participates
  – Serves as liaisons to the chancellor unit/campus represented
  – Assists in determining change management, communications, and/or training strategies for a specific project
  – Assists in disseminating information to your chancellor unit/campus
  – The role of this group is advisory only, with final decisions made by an executive committee formed of by direct reports to President Barchi

• Role of School/Unit Representatives:
  – Provides input into the project
  – Hands on during design and testing
  – Serves as a change agent
  – Communicates project updates and key changes within their organization

• Will conduct targeted focus groups

• Encourage grass roots communication and solicit feedback

Recruitment
• Director of Communications – Stephanie Reed starting 2/17/16
• Director of Training – position posted