



## Enterprise Planning for Academia



Barrachd works with a number of the UK's leading universities to create strategic planning solutions tailored specifically to their individual requirements. Please explore this interactive PDF to find out how these solutions could help you achieve your strategic plans.

*"If we didn't have the solution that Barrachd implemented, we'd still be going through spreadsheets, gathering data from many different sources, recalculating the data yet never really coming back with the information they needed."*

**University of Glasgow**

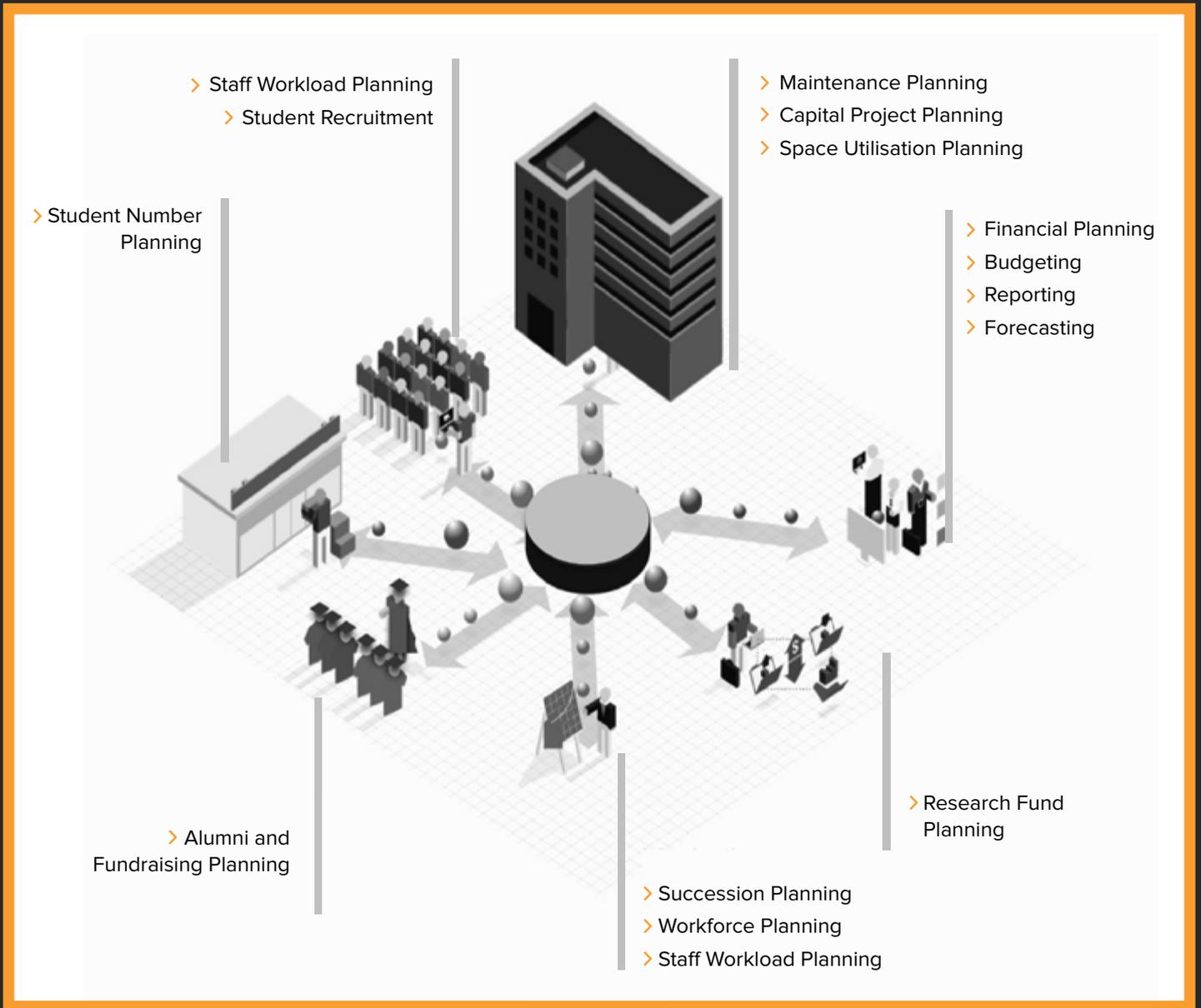
*"Now our people can look at their data and test scenarios. We want them to take their data and ask 'what if..' to accurately discover the effects on their cohort of students, on their income and ultimately on their staffing activity... We can now spend our time thinking about strategy rather than worrying about single numbers."*

**University of Liverpool**



# Enterprise Planning for Academia

Use the planning map below to navigate



# Enterprise Planning for Academia

## University wide, participative strategic planning

The world of Academia is becoming increasingly competitive with every University fighting to attract and retain the best student candidates from within the UK and around the globe. With the cap on the number of students being lifted for some institutions, this will only intensify. Shifting demographics, rising costs of operation, reductions in funding, pressures for accountability and widespread economic contraction characterise the environment in which most UK Universities currently operate.

You need to find new ways to reduce costs without sacrificing services and explore new opportunities to increase revenue. As rivalry intensifies, institutions must find ways to gain competitive advantage to attract and retain top students and research investments. Your University needs to offer a compelling range of subjects and facilities, to encourage students not only to apply, but also to stay and complete their course. The reputation and attractiveness of your University is key to its financial stability, therefore, the accuracy of your planning process is vital to the University's ongoing success.

Academic Enterprise Planning from Barrachd will provide information that is easily accessible, accurate and up to date allowing you to make informed decisions based on your actual performance. You can no longer rely on paper-based processes and isolated data in disparate systems. A complete view of information on students, lecturers, curricula, operations and finance provides the new intelligence needed to make effective decisions.

With our enterprise planning tools you can access current data to assess performance, build flexible plans and models to meet the needs of the University and ultimately progress from "what is" to evaluate the "what if", critical to forecasting future performance.

## Student Number Planning

You have numerous departments offering a diverse variety of courses and large numbers of students. Can you accurately plan future numbers so you can reliably and confidently invest in the right resources for your expected intake?

Student numbers form the basis of any long term strategic plan. It is a critical function that needs to be responsive, flexible and precise. Of course, student numbers don't just drive revenue; they also consume resources, so balancing supply and demand is critical to the effective and efficient running of the organisation. It's not straight forward either; you need to cope with the myriad of different student types, FT, PT, international, UG, PG, research and the associated incomes each one brings. You need to know the cost of each student, at each stage for each of the hundreds of courses you offer and also plan for the impact of any attrition at any time during the course and the financial impact that would have.

*“We want to use our income streams to invest in new buildings, in new facilities or in new residences for the students. To do this, we have to accurately predict how many students are going to join the university.”*

**Anita Wright, Head of Strategic Planning at the University of Liverpool**

### **Student Number Planning from Barrachd will allow you to:**

- Predict accurately the resources needed for incoming students
- Run ‘what if’ scenarios – what if we get more or less students than anticipated? How will this affect our budgets? How will this impact on the resources required?
- Automate and streamline existing processes
- Remove the need for manual input into spreadsheets
- Revise and adjust plans instantly
- Be ahead of the game

## Student Attrition and Attainment

Looking at student performance, retention and attrition and being able to track and predict student performance throughout the student journey helps identify those at risk of not meeting expected targets. This insight enables you to identify and improve interventions for under achieving students, and improve student results through effective tracking and monitoring.

Imagine the impact recruiting only successful students that are unlikely to drop out would have on the bottom line for the University. It's costly when a student drops out early from a multi-year course, that position cannot be back filled and that income stream is lost.

Predictive Analytic technologies enable us to review many years of historical data, to create a profile of a high achiever or conversely, a student that is likely to attrite. By comparing this profile to current applicants, we can help marketers and registration staff attract and recruit the students most likely to succeed. This of course, protects the Universities income, improves its overall performance, league table position and attractiveness to future candidates.

### **The Student Attrition and Attainment solution provides:**

- Unrivalled analysis, reporting and monitoring capabilities to help understand the issues contributing to absence and student attrition
- Automatic notifications and warnings when predefined conditions are met, prompting staff to intervene
- Insight to improve the speed and effectiveness of interventions

## Workforce Planning

Effective workforce planning is an integral part of the planning cycle. Your plan needs to be robust enough to manage short term resourcing activity but flexible enough to cope with a range of possible future scenarios. You need an accurate picture of learning and teaching provision and the insight to identify the action to realise it. Our strategic workforce planning solution defines the activities necessary to have the right people with the right skills in the right roles at the right time.

### **Our solution gives you the information to:**

- Manage current and predict future staff costs
- Review the efficiency of current staffing structures
- Accurately plan for new activities
- Anticipate and resolve issues with staff and skills shortages
- implement a robust succession plan

## Staff Workload Planning

As well as ensuring you have the right number of staff with the right skills, you need to make sure their workloads are balanced. Your staff are responsible for meeting the teaching needs of students, while also fulfilling vital research roles and important admin tasks. They are your most valuable resource and you need to make sure they are making the best use of their time.

Our workload planning solution gives a full view of every staff member's teaching, research and administrative workload. Scenario planning allows you to balance duties, not matter what happens – if there's demand for a new course, if a new research grant is allocated or if student numbers rise or fall.

**The Staff Workload Planning solution provides:**

- A single view of all academic staff and their individual workloads
- In-depth knowledge of allocation of resource across schools within each faculty
- A University wide view on of workload balancing issues by school, by department, by subject
- The ability to aggregate resource at subject level right up to university level
- Granularity of data on staff hours spent teaching individual modules and can include interschool and interfaculty transfer charges

*“We have to be able to look at the workload of the whole school, and decide if it’s really making the best use of the resources that we have”*

**Helen Macpherson of Glasgow University**

## **Estate and Facilities Management**

Responsible for the provision of facilities to support students and staff, and for creating a high quality environment for work and study, Estates and Facilities Management teams provide a number of key services. Your University may have a wide range of properties that present very different challenges, from buildings of great architectural importance that must be preserved to new, modern buildings that are sophisticated in both their design and maintenance requirements. Property management, capital planning, maintenance planning and the day to day activities just to keep the University “operational” are all their responsibility.

**The Education Resource Planning solution provides:**

- A forecast of available income streams for investment in new and existing facilities.
- A space management framework, making effective and efficient use of the University's buildings
- Accurate reporting and costing of space usage
- A robust framework for all aspects of estates and facilities management including, Capital Development Planning and Maintenance Programmes

## Financial Planning

You need to collate accurate, detailed information from a variety of departments and committees, incorporating new business plans, including forecasts from a number of faculties as well as student number projections, increasing staff costs, research finance projections and planned capital expenditure.

If you are still reliant on complex spreadsheets for your financial planning, you will know only too well how time consuming and labour intensive this can be. Multiple spreadsheets are difficult to consolidate, there can be little or no data integration and often a lack of version control. Output from every other aspect of planning within the University will feed into the Financial Plan for the University, making this a pivotal planning module.

**Our financial planning solution is tailored for Academic institutions and will:**

- Improve financial planning across the entire university
- Provide greater accuracy of data
- Consistently deliver timely, reliable plans and forecasts along with contingency plans
- Strengthen the link between strategic objectives and operational and financial plans
- Improve communication and collaboration between all contributors
- Enhance strategic decision making, enabling you to quickly identify, analyse and forecast the impact of changes as they occur

## Other financial planning solutions we offer:

While some institutions enjoy robust financial support, many others work hard just to stay in the black. With government revenue streams drying up, tuition and fee adjustment legislation and quotas on local students that reduce out-of-area revenues, institutions must have a strong understanding of their sources of revenue—including gifts, pledges, endowments and research grants.

### Alumni & Fundraising Planning

Sometimes overlooked, your Alumni can add kudos and attractiveness to your institution. Much can be made by maintaining links with gifted, talented and successful graduates. Similarly, relationships with successful, thriving and dynamic organisations can improve the University's credibility with ambitious undecided undergraduates.

By understanding the gifting patterns of corporations, foundations and major donors you can begin to see the relationships between the donors themselves and the projects and programs that interest them. Tracking trends emerging from capital campaigns maximises their effectiveness and can help design successful future campaigns.

### Research Funding Planning

Finding the right balance between learning, teaching and research can be a challenge for many Universities. For a research university, the revenues gleaned from this kind of activity generate a substantial part of its income. Research grants also maintain the University's reputation and have a very strong influence on its ability to attract the highest level of research staff and students.

Having an accurate Research Funding Plan linked to a Staff Workload Plan is therefore, of the utmost importance.



We exist to help our customers reveal what they don't know, before it's too late.

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