



# DEPLOYING CONNECTED PLANNING SOLUTIONS AT SAMFORD UNIVERSITY

## The Institution

Samford University, founded in 1841, is a private university located in Birmingham, Alabama. They are the 87<sup>th</sup> oldest institution of higher learning in the United States so successful change is a necessity to honor tradition but stay relevant in these modern times. Samford U was recently ranked #1 in the nation for student engagement by the Wall Street Journal/Times Higher Education.

In fact, Beck Taylor, Samford's 19<sup>th</sup> president, summarized his focus in joining the institution with two words. Continuity and Change. The president reminds the institution to protect their standing as a crown jewel in Christian Higher Education and hold true to their timeless values. And, to embrace change to "[continuously reinvent the university](#)" to fully prepare students for an ever-changing world. That vision perfectly aligns with the University's [Strategy and Planning](#) group, charged with overseeing the creation of university strategy, defining and developing metrics, feedback and reporting, and anticipating the Samford of the future.

## The Challenges

For accuracy, a broader set of people need secure and focused access to, and accountability for, the budget. Samford had an existing data analysis tool, but it was not considered user-friendly or easy for casual users to leverage. In addition, Samford utilizes an incremental budgeting methodology but has a growing need to identify budget targets for their units.

# The Solution

The **Budget Development and Budget Management and Analysis** models offers the following:

- Allows real time tracking of budgets under development with detailed review opportunities.
- Salary and staff planning at the detailed level with roll ups available.
- Vacancy planning completed by budget managers
- A strong process around managing positions and salary budgets
- A reconciliation model to summarize budgets so that adjustments can be made
- A Fund Summary with activity across all funds.
- Visibility across the Banner system with the items that make up the University's Chart of Accounts (known as FOAPAL in Banner)

# The Results

The **Budget Management and Analysis** tool designed by **Allitix** and based on the **Anaplan** solution provided the accuracy, transparency, and secure access that the university needed. As a result of the solution deployed on campus, they saw these benefits:

- For the first time, budget managers can track staff and faculty along with corresponding budgets.
- Budget managers now have an easy-to-use tool and are empowered to manage their budgets including their YTD spend.
- Interactive reports are readily available to determine if budget managers are within budget guidelines.

# The Future

With the success of this model, Samford University is working toward deploying the following additional plans:

- Financial Impact Scenarios Modeling
- Enrollment and Student Credit Hour Tracking
- Endowment Management

*"Our University leadership expects current and reliable data for decision making and financial review. The ability to quickly access this data and communicate with leadership is of incredible value."*

**Matt DeFore**  
Director of Budget and Financial Planning



Location: Birmingham, Alabama  
Type: 4-year Private  
Total Enrollment: 5,729  
Undergraduate Enrollment: 3,576  
Accreditation: SACSCOC  
Financial Systems: Ellucian Banner

## Goals

A budget development tool that included salary planning functionality and integrates with Ellucian Banner.

## Solutions Deployed

Budget Development  
Budget Management and Analysis

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