

# Anaplan for R1 research universities

Drive financial agility and institutional resilience amid volatility



## Planning in an era of disruption: A new mandate for research universities

America's R1 institutions are navigating a period of unprecedented complexity. Declining public funding, enrollment shifts, research grant uncertainty, inflationary pressures, and the urgency of digital transformation are forcing universities to rethink how they plan, allocate resources, and sustain mission-critical operations.

Yet, most planning processes remain overly siloed, manual, and reactive — relying on legacy systems and spreadsheets that can't keep pace with today's challenges.

**Anaplan empowers R1 universities with a real-time, unified planning platform** that connects finance, operations, and IT — delivering the agility, insight, and collaboration needed to thrive in this new era of higher education.

### Connect strategic, financial, and operational planning across the institution



#### Finance and budgeting

Link tuition, grants, auxiliaries, and endowments in a unified model for accurate forecasting and planning.



#### Academic and research operations

Model cost of instruction, research capacity, and resource utilization at the college or department level.



#### IT and data infrastructure

Integrate data from ERP, SIS, HR, grants, and institutional research systems into a real-time planning environment.

## A modern platform for an era of institutional transformation

### Macroeconomic pressures

- Volatile tuition revenue and inflation-driven costs
- Heightened competitive pressures for federal research dollars
- Rising demands for transparency from boards, accreditors, and public stakeholders

### Micro-institutional challenges

- Misaligned budget models across academic units
- Limited visibility into program profitability and indirect cost recovery
- Inflexible capital planning and aging infrastructure

Anaplan replaces fragmentation and inertia with a **scalable, intelligent planning platform** designed for the **speed, scale, and scrutiny required by R1 institutions**.

## Critical use cases for Anaplan in R1 institutions

### Integrated budgeting and long-range planning

Develop all-funds, multi-year financial plans that connect tuition, research, auxiliaries, philanthropy, and capital. Model enrollment scenarios and policy impacts in real time.

### Academic resource modeling

Analyze cost, margin, and capacity by program, college, and modalities. Support tuition discounting, instructional FTE planning, and tenure vs. adjunct modeling.

### Research grant forecasting and indirect cost recovery

Forecast grant activity, overhead recovery, and research spending by PI, department, and sponsor. Align research infrastructure and staffing with funding trends.

### Capital and facilities planning

Model deferred maintenance, capital projects, and energy efficiency investments under various funding and usage scenarios.

### Workforce and labor cost planning

Align staffing with enrollment trends, research cycles, and hybrid delivery. Model compensation scenarios, union negotiations, and workforce retirement.



## Why Anaplan for R1 institutions?

### Precision at scale

Model across hundreds of funds, units, and dimensions with Anaplan's **Polaris™ calculation engine** — purpose-built for complex institutional planning.

### Embedded intelligence for better decisions

Use AI-driven forecasting and optimization to evaluate tuition elasticity, research activity, and space utilization tradeoffs.

### Institutional collaboration

Bring together finance, provost offices, research, IT, and academic leaders on one collaborative platform with dashboards, alerts, and commenting.

### Seamless system integration

Connect to Workday, Oracle, Banner, PeopleSoft, and grants systems via APIs and ETL tools to establish a single source of truth for planning.

### Enterprise-grade security and governance

Comply with FERPA, HIPAA, and state audit mandates using role-based access, encryption, and full audit trails.

## Institutional resilience starts with connected planning

### With Anaplan, R1 institutions can:

- Optimize financial sustainability across revenue streams and mission areas
- Respond with agility to enrollment, funding, or policy shifts
- Enhance transparency of board-level and accreditation
- Align academic, facilities, and research planning in real time

## Modernize planning to strengthen institutional resilience

Anaplan is the connected planning platform trusted by over 2,500 organizations — including leading R1 institutions — to unify strategy, finance, and operations through real-time collaboration and enterprise-grade security.

**Request a demo** to see how Anaplan helps leading R1 institutions modernize planning for a resilient, responsive future.



### About Anaplan

Anaplan is the only scenario planning and analysis platform designed to optimize decision-making in today's complex business environment so that enterprises can outpace their competition and the market. By building connections and collaboration across organizational silos, our platform intelligently surfaces key insights — so businesses can make the right decisions, right now.

More than 2,500 of the world's best brands continually optimize their decision-making by planning with Anaplan.

To learn more, visit [www.anaplan.com](http://www.anaplan.com)

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