Enterprise Computing Group
Project Request

Request Number: 

Requestor Name: Carolyn Spooner
Requestor Department: USNH Accounting Services
UNH Budget Office
Application System Name: Banner Finance, HR
Project Name: Implement Banner Endowment Module by 2010
Project Champion: Carol Mitchell
Kerry Scala
Date Submitted: 8/21/2008
Date Required: 7/1/2009

Project Information

Project Description
This project would review the functionality of the Banner endowment management module supplied as part of the Banner Finance system to determine how to best apply that functionality to all USNH and UNHF endowments; then implement the module.

Statement of Business Need and Urgency
Endowment funds are crucial elements in any financial plan for supporting both present and future activities within the University system. Management of these endowments can be very complex with specific restrictions on the use of the income generated by the endowed funds. In addition, USNH uses a Pooled investment strategy to provide economies of scale for all funds. Allocation of units to each fund for gains/losses/new investments/dividends etc can be extremely cumbersome. The Banner module is designed to assist with those efforts. As USNH and UNHF endowments grow through prudent investment management and gifts, implementation of this module will provide timely distributions of earnings to the appropriate areas, and online visibility of the institutions investment.

Project Benefits
This project will allow USNH to minimize the current costs associated with managing these funds and provide improved access to information to the departments and other institutional areas.

With the implementation of Banner Advancement at UNH, enabling the Banner Endowment module will significantly enhance UNH’s ability to track future endowed
Project Risks/Consequences
There are no known risks associated with doing this project.

Project Resource Estimates

<table>
<thead>
<tr>
<th>Resource Group</th>
<th>FTE Range</th>
<th>Confidence Level</th>
</tr>
</thead>
<tbody>
<tr>
<td>ECG</td>
<td></td>
<td>[High/Medium/Low]</td>
</tr>
<tr>
<td>Functional</td>
<td>Large (9 months)</td>
<td>Medium</td>
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Project Costs
There are no known costs beyond USNH personnel. However, there may be some hardware, consulting and/or training costs associated with this project.

Supporting Project Information

Banner Information
This is implementing a baseline module of the Banner Finance application.

Project Interdependencies
The UNH Advancement implementation should be live or nearly live, before this project is undertaken.

Project Constraints
USNH Finance users do not generally have significant time to devote to projects during the months of June through August.
Approvals

Functional Manager

Technical Manager

Approved By

Steering Committee Chair