Fall 2016 Planning Letter Instructions / Template

Due by Tuesday, November 1, 2016 to Mike Zeig (zeigmich@msu.edu), with copies to Margie Aimery (aimery@msu.edu) and the EVPAS Office (adminsv@msu.edu). Address questions/concerns to Mike by email or phone (353-1746).

Utilize the template below to complete your unit's Fall 2016 Planning letter. Letters should not exceed **7 pages** in length.

Unit Name Here

Strategic Vision
- Provide a broad overview of your unit's strategic vision for the next 5 years. Specifically note any significant updates/changes to this vision from prior years.

Short-term Priorities (next 1-2 years)
- What are your unit's short-term priorities for achieving your stated vision? Identify these priorities utilizing the template provided.

As an example:

Priority 1:

        Initiatives / projects to achieve priority 1:

        Timeline for completion:

        Internal funding strategy:

        Outcomes / measurements of success:

Long-term Goals (next 3+ years)
- What are your unit's long-term goals? How will your unit respond to a constantly changing higher education environment and be increasingly efficient in supporting the academic mission of the institution? Identify these goals utilizing the template provided.

As an example:

Goal 1:

        Strategies for achieving goal 1:

        Anticipated timeline:

        Internal funding strategy:

        Outcomes / measurements of success:

Space Needs
- Briefly describe any space needs related to ongoing or projected projects in the next couple years.

Unit Reserve Balances
- Attached is an overview of your unit's monetary reserves with balances pulled from KFS following second close. Review your unit's status and indicate reasons for increases or reductions and planned uses of reserves. Commentary on the summary overview is appreciated. A detailed view of each account is provided for reference, but you do not need to provide a response for each account. During your review, keep in mind that as a public institution, MSU needs to recognize both concerns over accumulated fund balances and the need to provide units with flexibility to utilize funds to plan for and catalyze new strategic initiatives.

Employee FTE Counts
- Attached is a chart outlining your unit's historical All Funds FTE levels. Data are pulled from the MSU Enterprise Data Warehouse from November of each year and do not include temporary or on-call staff. Review this document to: 1) identify any discrepancies, 2) discuss where and for what purposes any increases occurred either overall or within specific subunits, specifically within the past year, and 3) describe how your unit is working to limit future growth in FTE counts.

FY 18 Planning
- Given the State's long-term funding needs for big ticket items such as infrastructure funding, Flint, and the Detroit Public Schools, we anticipate tepid support for higher education in the coming years. We will refine projections as information becomes clearer, but at this time it is prudent to plan for at least a potential 1% budget reduction for units for the 2017-18 fiscal year. Outline the areas a potential budget reduction would most likely impact should that be necessary.

Advancing our Culture of High Performance
- Provide a brief paragraph on each of the following topics.
    - What processes / tasks / functions are being streamlined to increase efficiency while still delivering excellent service?
    - Describe efforts within your unit to shift resources toward high priority projects.
    - Describe your unit's succession planning efforts, inclusive of developing future institutional leaders and cross-training staff across unit functional areas.

Performance Metrics
- Append updated metrics for your unit. Metrics submissions do not count toward the 7 page letter limit.
- As a reminder, note the following metrics guidelines:
    - Metrics should focus on outputs and performance.
    - Limit the number of metrics to the most important top-level areas of your unit (approximately 10 or fewer).

- o Metrics should demonstrate your unit's current performance, internal goals, and peer institution benchmarks. Radar charts may be an effective format for displaying metrics, but you are welcome to utilize additional data visualization tools as well.