

Fall 2017 Planning Letter Instructions / Template

Due by Friday, November 10, 2017 to Mike Zeig (zeigmich@msu.edu), with copies to Margie Aimery (aimery@msu.edu) and Kami Smith (smit2358@msu.edu). Address questions/concerns to Mike by email or phone (353-1746).

Utilize the template below to complete your unit's Fall 2017 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 General Fund FTE levels. Data are pulled from the MSU Enterprise Data Warehouse at the October freeze of each year. Counts are based upon the proportion of the FTE paid by a unit, not necessarily their primary assignment home. Temporary and on-call staff are not included. Some reporting mechanisms require different methodologies, which can lead to slightly different numbers. If you have questions or concerns about this data we can provide the data file listing each employee counted in this report for cross-reference purposes.

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. Please note that given the environmental factors outlined below, we anticipate each unit will need to reduce its general fund non-academic staff counts by 10% over the next five years.

FY 19 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 0.5% budget reduction for units for the 2018-19 fiscal year. Outline the areas a potential budget reduction would most likely impact should that be necessary. Additionally, please note that the Office of Planning and Budgets will continue to work with units in anticipation of the decentralization of fringe benefits beginning in the 2018-19 fiscal year.

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).
 - 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.