

MICHIGAN STATE
UNIVERSITY

November 30, 2022

MEMORANDUM

TO: Deans



FROM: Thomas D. Jeitschko, Ph.D., Interim Provost Designee

SUBJECT: FY 2023-24 MAU Strategic Planning and Budget Development

In keeping with the process implemented last year, we will pursue a holistic discussion of financial, space and facilities, and technology needs as we look ahead to planning and resource allocation for the 2023-24 academic year.

We have less time this year than in the past to respond to the budget and planning letter. While the change may require some adjustments in your units, I hope that the tighter timeline will result in better outcomes.

Realizing there is limited time to develop the budget letter, we expect the narrative, asks, and justifications to be brief and concise. If you would like to provide additional details, be sure to add them as appendices.

Please provide a report of **no more than 8 pages by January 13, 2023**, to Ryan Thelen (thele103@msu.edu), Bethan Cantwell (cantwellb@msu.edu), Barbara Kranz (kranzb@msu.edu).

FY24-FY28 Strategic Direction Narrative

Summarize your MAU's 5-year strategic plan, including how it aligns with and can contribute to the MSU 2030 Strategic Plans (including DEI and RVSM). This is intended to be a brief, direct, objective, conceptual overview that reinforces the justification and highlights the need for additional investments. (< 500 words).

Also, provide a brief review of last year, including accomplishments and unmet goals.



OFFICE OF THE
PROVOST

Michigan State University
Hannah Administration Building
426 Auditorium Road, Room 430
East Lansing, Michigan 48824

Phone: 517-355-6550
Fax: 517-355-9601
provost.msu.edu

FY23, FY24 General Fund Budget Summary

	(a)	(b)	(c)	(c-a)	((c-a)/a)
	FY23 Budget	FY23 Forecast*	FY24 Budget (excluding new asks)	\$ Change from FY23 Budget	% Change from FY23B
Beginning balance/carryforward	\$10	\$10	\$5	(\$5)	(50%)
Budget Allocations	50	50	52	2	4%
Expenses	50	55	51	1	2%
Allocations – Expenses	0	(5)	1	1	--
Ending balance	\$10	\$5	\$6	(\$4)	(40%)

*FY23 forecast should be calculated using FY23 Q1 and Q2 actuals, plus known expenses and commitments (such as ongoing salary costs, supplies and services, etc., excluding transfers to reserves).

Overview of FY24 New Asks (URR: Unit Resource Request)

Outline how your MAU plans to support the MSU 2030 Strategic Plans over the next five years, noting specifically how these actions will impact your budget and how you have accounted for that impact. Further, describe measurable impacts to your budget as a result of the strategic plan work to date.

To achieve the goals of your strategic plan, describe your new asks, also known as URR in this section. Also mention contributions from existing internal funds and other sources of funding, such as collaboration with other MAUs. Differentiate between recurring, one-time, or short-term URR submitted as part of this budget cycle and the intended use of the funds.

Also provide a review of prior budgetary commitments carrying forward to FY24 in **Planning Analytics**, the budget and planning system of record. Please note any discrepancies between Planning Analytics and your budget and planning system.

New Revenue Streams and Shifting Costs

Describe plans to develop new revenue streams and/or reprioritize expenses within your unit. Developing and reallocating resources are vital to realizing our 2030 Strategic Plan. What plans do you have to grow revenues, reallocate existing resources towards new priorities, or contain or reduce existing expenses?

New Programs and Academic Offerings

(Academic Units only) Are you considering the development or phasing out

of schools, departments, programs, institutes, initiatives, or academic offerings that have the potential to increase efficiency and effectiveness? What are the risks to your MAU or the University if new programs are not funded?

Strategic Faculty and Staff Composition Plans

Provide an update on last year's faculty recruitment and retirement plans (Attachment 1).

Are you planning to make strategic new hires, or to add new or grow existing departments? Do you have plans to make cluster hires or other high-profile hires, including department chairpersons? If yes, how much do you expect to invest in these hires and their startups?

For each new request, provide a brief position description and explain the funding that is requested and cost-sharing from your unit. If any of these positions involve cross-college collaborations, please identify them.

Space Planning and Alteration and Improvement Requests

Note relevant updates to the unit's prior year space requests. If you have new requests for space to accommodate new programs or hires, including lab space, please provide a summary.

Submit up to five Alteration and Improvement (A&I) requests for the 2023-24 projects, in rank order of priority. Explain how the renovation advances your strategic priorities and your willingness to share costs. All requests must be submitted through **Planning Analytics** and must include estimates from Infrastructure Planning and Facilities (IPF). To minimize out-of-cycle requests, please include all space requests anticipated for the next two years.

Technology (TLE) Planning Requests

Identify requests for consideration within the Strategic Investment Projects (SIP) pool of TLE funds. Investment in technology that will support areas identified in programmatic planning as well as in the Alteration and Improvement (A&I) requests will be given priority. As in previous cycles, funds are also available to support routine maintenance projects through Maintaining Technological Effectiveness (MTE) funding within the TLE pool. All requests must be submitted through **Planning Analytics**.

Existing Reserves

Provide a review of existing reserves and your plans to deploy them in the upcoming years.

Additional Details

In addition to answering the above questions and providing the required attachments, please include other commentary or documentation to further support your MAU's budget development and strategic planning process.

Specifically, for academic units, we are interested in your unit's performance and progress in the following areas. Informed by data from the MAU Snapshot that offers summaries for all items except c and d, please address the following items.

- a. Retention and progression of students and time to degree in your college
- b. Efforts to reduce opportunity gap among students (data not provided in the standard snapshot packet)
- c. Efforts to increase the diversity of faculty, staff, and students, including your DEI accomplishments over the past year
- d. Status of implementation of DEI in annual reviews and the RPT process
- e. Honorifics and your unit's efforts to increase awards and honorifics
- f. Your unit's contribution to Innovation for Global Impact through research and creative endeavors
- g. Your unit's contribution to the 2030 goal of \$1 billion in annual research expenditures
- h. Collaboration between colleges
- i. Collaboration between colleges and provost office units (Attachment B)

Attachment A – Faculty Recruitment and Retirement Plan

Attachment B – FY24 Activities related to other provost office areas

cc: Lisa Frace, Senior Vice President, Chief Financial Officer and Treasurer

Rebecca Barber, Vice President, Financial Planning and Analysis

Mike Stokes, Assistant Vice President, Office of Financial Planning and Budget