


**MICHIGAN STATE**  
UNIVERSITY

December 8, 2022

**MEMORANDUM**

**TO:** Vice Presidents and Executive Officers

**FROM:** Michael Zeig   
Chief of Staff and Special Assistant to the President

**SUBJECT:** FY2023-24 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 fiscal year. We have revised and accelerated the budget development timeline to make information available to both leadership and the campus community earlier in the budget process.



We expect the narrative, new requests, and justifications to be concise and aligned with both the university-wide strategic direction and values articulated in the 2030 Strategic Plan.

**OFFICE OF THE  
PRESIDENT**

Please provide responses and related materials (of no more than 6 pages) by **January 20, 2023**, to Amanda Goll ([goll@msu.edu](mailto:goll@msu.edu)). We will meet with each unit in late January and February.

**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)

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

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**FY23, FY24 General Fund Budget Summary**

	(a)	(b)	(c)	(c-a)	((c-a)/a)
	FY23 Budget	FY23 Forecast*	FY24 Budget (excluding new requests)	\$ Change (Incr/Decr) from FY23	% Change (Incr/Decr) from FY23
Beginning Balance /Carryforward	\$	\$	\$	\$	%
Budget Allocations					
Expenses					
Annual Operating Result					
Ending Balance					

\*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 Unit Resource Requests (URR)**

Outline how your unit 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. Describe what you will contribute from existing internal funds and collaboration with other MAUs. Further, describe measurable impacts on your budget because of the strategic plan work to date.

To achieve the goals of your strategic plan, explain and prioritize any new funding requests for this budget cycle. Differentiate between recurring and one-time and explain the intended use of the funds. Enter all new requests in **Planning Analytics – Unit Resource Requests (URR)**, the budget and planning system of record.

Review and note prior budgetary commitments carried forward to FY24 and beyond. Please note any discrepancies recorded in Planning Analytics.

**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?

**Strategic Staffing Plans**

Summarize your unit’s strategic staffing plans. Are you planning to make strategic new hires, or to add new or grow existing departments? If yes, how much do you expect to invest in these hires?

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-unit 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, please provide a summary.

**Existing Reserves**

Provide a review of existing reserves and any plans to deploy them in the upcoming year.

**Common Good**

Note services that should be funded as "Common Good". Provide justification and relevance to the University Strategic Plan and current funding mechanism.

**Additional Details**

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

Thank you for your continued leadership during what has been and continues to be challenging times. I appreciate your willingness to work together and collaborate to make the best use of resources and support the University's mission and values.

Enclosure:

1. Updated Budget Process Timeline

cc: Lisa Frace, Senior Vice President, Chief Financial Officer, and Treasurer  
Rebecca Barber, Vice President, Financial Planning and Analysis  
Mike Stokes, Assistant Vice President, Financial Planning and Budget  
Amanda Goll, Deputy Chief of Staff, Office of the President

	November	December	January	February	March	April	May	June	July
Board						Submit housing & dining rates for approval		Submit institutional operating budget for approval	
President					EVPs meet with President to advance MAU portfolio budget requests				
EBC						Provide Prioritization to CFO	Reviews updated projections, provides feedback on updated budget outcomes		
EVPs		Strategic planning & budget development memo to MAUs		EVPs assess program requests & allocations					
CFO	Strategic Planning Memo			CFO provides financial update to University Council		Preliminary budget results; subject to updated assumptions			
FPB		Budget Guidebook, Calendar, Data, Assumptions	Budget Summit	Budget System OPEN			Update enrollment projections & budget assumptions	Reopen budget system to adjust budgets for final allocations & issue allocation letters	Final budget in system; carryforward applied; confirm unit spending plans and commitments
MAUs			MAUs enter base budgets & Unit Resource Requests in budget system						
				Submit budget development memos & strategic planning templates to EVPs					