

Dear members of the "Marshall 20/20" Strategic Planning Team:

I trust that all of you have been as encouraged as I have been by the positive results of the long-range strategic planning process we began earlier this month. I truly believe we are taking on one of the most significant challenges in Marshall's history, but in doing so we have begun this process with one of the most collaborative and constructive team efforts I have ever witnessed.

Thank you to each of you for your continued enthusiasm, engagement and support as we proceed. Each of us has a tremendous stake in the successful outcome of this endeavor as we work together to develop this "shared vision and plan for our future."

At the conclusion of our planning retreat, we established an itemized action plan with a designated leader responsible for the progress of each element. As a reminder, those action plan items (and lead contacts) are as follows:

1. **Develop A Comprehensive Communication Plan:** Lead Person – Matt Turner (matt.turner@marshall.edu); Draft Plan Deadline: October 18, 2013
2. **Formulate A Shared Future Vision Statement:** Lead Person – President Kopp (kopp@marshall.edu); Draft Statement Deadline: January 10, 2014
3. **Delineate Roles and Responsibilities For Long-Range Goals:** Lead Person – President Kopp(kopp@marshall.edu); Draft Statement Deadline: January 10, 2014
4. **Review The Academic Portfolio of the University** (examine courses, performance indicators, targets and alignment): Lead Person – Provost Gayle Ormiston (ormiston@marshall.edu) in collaboration with college deans and department chairs; Draft Process Development Deadline: January 10, 2014
- 4A. **Services Portfolio Review** (analyze the entire services portfolio/processes, performance and process improvement opportunities): Lead Persons: Drs. Gayle Ormiston, Jan Fox, Karen Kirtley, Layton Cottrill, Mary Ellen Heuton, Shari Clarke, John Maher, Joe Shapiro and Mike Hamrick; Draft Process Development Deadline: January 10, 2014
5. **Establish Timetable and Model for Budget Process:** Lead Person – Mary Ellen Heuton (heuton@marshall.edu) working with Budget Work Group; Draft Process Deadline: March 1, 2014
6. **Pro Forma Modeling of Unit Revenues and Costs (Net Revenue/Cost Determination) –** Lead Person: Michael McGuffey; Draft Model Deadline: March 1, 2014
7. **Develop Key Performance Indicators –** Lead People: Gayle Ormiston/Mary Ellen Heuton/Michael McGuffey; Draft Deadline: March 31, 2014

In order to move ahead and continue our momentum, we must now determine how many and what "action teams" need to be assembled in order to accomplish the action items/outcomes set forth in our plan within the agreed upon timelines. Your continued involvement in the strategic planning process will be crucial. To that end, I am writing to propose that we involve each invitee/participant from the October 11th Retreat in two action plan items that align with individual interests/expertise/preferences. The goal will be to configure and populate each team with individuals encompassing our University Community to the extent possible.

A reasonable assumption is the 18 members of the expanded Budget Work Group by default will be a part of the #6 Group responsible for the budget process itself. The academic deans are already slated to be a part of the Action Item #4.

Today, I am asking for each person to select two of the eight action groups (one if you are already on an action team) in which you would like to participate. You can list your first preference and your second preference. We will try to accommodate everyone but you may be asked to serve on a different group as we try to balance participation.

Any thoughts you may have on alternative approaches to organizing our work on the Action Plan are greatly appreciated. We don't necessarily have to have eight "action teams" if there's a better way to proceed; however, we will need to establish some working groups to move these items along.

We've moved along swiftly with our communications plan, which was our first action plan item. I hope everyone is reading the listserv messages and staying up-to-date with the new "20/20" website at www.marshall.edu/2020.

I look forward to receiving your feedback and ideas. Please send your preference(s) to the strategic planning email address marshall2020@marshall.edu.

Thank you,

Steve