

TALKING POINTS – MARSHALL’S 20/20 PLAN

Determining our vision for the next decade

The formal planning has begun

Marshall has just kicked off a formal strategic planning process to help us determine how we can thrive in a dramatically changing public funding environment. We are working together to develop a shared future vision.

- We must develop a contingency plan (risk management plan) for how we will function on reduced state and federal dollars for the foreseeable future.
- We are at the beginning of developing such a plan. The October 11 kick-off session was designed to review where we are today with our budget model, its capacity to respond to current and future public funding reductions, what a new business model for Marshall might look like and what we need to know to begin developing it.
- We discussed Marshall’s “value proposition” and our mission, market and margin. What is the job to be done, where are the gaps and finding new revenue sources or reallocation of existing ones.
- We also touched upon the importance of identifying our competitive advantage, the Marshall Advantage if you will, that is distinctive and distinguishes our university from its competition.
- While right now we are focused initially on our revenue and budget model, we see this as evolving into a broader strategic vision for the entire university. We are together developing a shared future vision.
- We’re calling our effort “Marshall 20/20” which signifies planning for the year 2020 and beyond, while also highlighting our need for a clear, actionable vision for our long-term success. Our goal is to accomplish both and more.

Who is involved?

- Our kick-off meeting included a diverse group of about 55 faculty, staff, students and administrators from across all campuses.
 - Success of our plan will require input and feedback from the entire university community and open and honest conversations among us all.
 - A list of the participants will be available at a new website created for Marshall 20/20. We’ll provide details once that site is established.
 - A seven point Action Plan was developed with the expanded Budget Working Group charged with its initial implementation.

So what's the next step?

During the October 11 summit, we established a seven-point action plan with specific deadlines. We'll follow up this week with participants from that summit, but each lead contact, below, will be responsible for setting up necessary forums and timeframes to meet the deadlines we created.

The contacts will continue the discussion within their respective areas, and we will reconvene a larger joint meeting in the near future with our facilitator, Rick Staisloff.

The seven points are listed in order of priority:

1. Develop a comprehensive communication plan
 - a. Lead contact: Matt Turner, senior VP for communications, matt.turner@marshall.edu
 - b. Deadline: Draft plan due this Friday, October 18
 - c. Communications ongoing beginning today
2. Formulate a shared future vision statement
 - a. Lead contact: President Kopp, kopp@marshall.edu
 - b. Deadline: Draft statement due January 10, 2014.
3. Define the responsibilities of various campus groups for our long-range goals
 - a. Groups include faculty, staff, Board of Governors, chairs, deans and administrators
 - b. Lead contact: President Kopp, kopp@marshall.edu
 - c. Deadline: Draft statement due January 10, 2014
4. Establish a timetable and model for the budget process
 - a. Lead contact: Mary Ellen Heuton, chief financial officer, heuton@marshall.edu
 - b. Deadline: Draft process development starts November 1, 2013
 - c. Draft plan due March 1, 2014
5. Pro Forma modeling of revenues and costs (what we charge versus what it costs us to deliver those services)
 - a. Lead contact: Michael McGuffey, director of institutional research, mcguffey@marshall.edu
 - b. Deadline: Draft plan due March 1, 2014
6. Review our academic portfolio (examine our courses, current performance indicators and how well we align with them)
 - a. Lead contact: Gayle Ormiston, provost, ormiston@marshall.edu
 - b. Deadline: Draft process plan due January 10, 2014
7. Develop new key performance indicators

- a. Lead contact(s): Gayle Ormiston, Mary Ellen Heuton and Michael McGuffey
- b. Deadline: March 31, 2014 (follows completion of shared vision statement)

How can I help plan Marshall's future?

We are creating a special website that will allow for easy interaction of everyone on campus and even those off campus who want to share their ideas. We'll be circulating that information once the site is set up.

This is an evolving and organic process right now – as each of our team leaders comes back to the table with their progress, we will provide updates on the next meeting or discussion group.

For now, please feel free to send your questions and ideas to Matt Turner at matt.turner@marshall.edu. Matt will share them with the group and add them to the new website once it is set up.