

# MICHIGAN STATE UNIVERSITY

24 October 2007

## MEMORANDUM

**TO:** Deans and Academic Support Unit Administrators

**FROM:** Kim Wilcox



**SUBJECT:** Changes to TLE processes

Teaching and Learning Environment funding (TLE) originated over a decade ago as an earmarked \$10,374,200 line item in the annual MSU budget to be used as "recurring funding for non-recurring investments" in technologies that facilitate or enhance the teaching and learning environment. Over the years, TLE has provided MSU with over \$100 million of technology investment. Digital technologies account for the great majority of the uses of TLE funds, although TLE may also be used for non-digital technologies (e.g., microscopes and other laboratory equipment, specialized field equipment such as rock hammers, clinical exam room equipment, etc.).



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Earlier in 2007 I charged Vice Provost Gift and a group of deans and associate deans to reassess the mechanisms for TLE funding requests and allocations so that the process for TLE funding requests might be:

- more fully integrated into the overall academic planning and budgeting processes;
- focused more strongly on strategic purposes and gains for MSU academic programs;
- simplified as much as possible;
- provide improved timing of TLE funding.

The changes described in this document are intended to address or begin to address these objectives, and are based strongly on those consultations. These changes remain consistent with the Board of Trustees' original intentions for this funding program.

Beginning with the FY 2007-08 planning and budget cycle...

1. The process for requesting and allocating TLE funds will be combined with the regular budget allocation process. Colleges and academic support units will make a *single budget proposal* to the Provost annually, which *includes requests for TLE-appropriate purposes*, following the format and instructions provided by the Office of the Provost and the Office of Planning and Budgets. The request for TLE funds will be made explicitly in the context of the college's overall strategic proposals.
2. TLE funds would be requested and allocated in two simplified categories:

(A) Strategic Investment Projects

Strategic Investment Project (SIP) funding would be provided in block amounts, project by project, to support the technology budgets of specific strategic projects proposed by the colleges and approved by the Provost in the course of the routine budget and planning process. Colleges would describe their strategic proposals in their planning materials and would provide a technology budget as an explicit component of any overall budget requests being made to support each SIP.

(B) Maintaining Technological Effectiveness

Another key use of TLE funds is to upgrade and refresh the existing technology environment. Maintaining Technological Effectiveness (MTE) funding requests would be made as part of the regular budget and planning request cycle, using spreadsheet request formats similar to those used for recent TLE request cycles -- that is, each college would list MTE needs and associated budgets in priority order in a spreadsheet of a format specified by the Provost's budget planning and request materials

3. The Provost and Vice Provost for Libraries, Computing and Technology (VPLCT) will collaborate to allocate TLE funds.

When budget request materials have been received in the Office of Planning and Budgets (OPB), OPB will send the VPLCT copies of the requests, and also will compile a consolidated list of SIP requests and send those to the VPLCT. VPLCT will simultaneously compile a consolidated list of MTE requests.

Once the Provost has determined the appropriate tentative funding support for strategic projects, the VPLCT will compile a draft overall TLE

allocation to review with the Provost, based on both SIP and MTE requests and allocations.

4. The VPLCT's office will continue to administer the TLE accounts. All expenditures against any TLE account will be processed through the VPLCT to verify the appropriateness of each expenditure.
5. Each college or academic support unit will be assigned a separate TLE account for each Strategic Investment Project. Funds in each SIP account may be used for any purpose for which TLE funding is appropriate and related to the project purposes for which the funds were originally allocated.
6. Each college or academic support unit will have a single TLE account for MTE funding. The incremental MTE funding approved in each budget cycle would be added to these accounts, unit by unit. This account could be used for any of the purposes for which TLE funding is appropriate, including Faculty Computing.
7. The match requirement for any types of TLE funding is eliminated, although provision of matching or complimentary funds by a unit may be still taken into account in funding decisions.
8. Balances in the SIP accounts would be swept to the VPLCT TLE sweep account at the *end of each fiscal year* and the unit account closed, unless the unit makes a valid argument for extending the life of the account, in which case any remaining balance would carry forward to the new fiscal year.
9. Balances in MTE accounts would carry forward across fiscal year boundaries, but 50% of any fiscal-year-end balance would revert to the VPLCT TLE sweep account (newly allocated funding would be added after this sweep).
10. New SIP accounts would become available for first use typically in late July of the fiscal year in which they are first funded. Special provisions, made through the VPLCT, will remain in place by which to establish early spending ability for select accounts when that is needed to get projects in place by the start of Fall Semester.

C: Lou Anna K. Simon, President  
Fred L. Poston, Vice President for Finance and Operations and Treasurer  
David Byelich, Assistant Vice President, Planning and Budgets  
David Brower, Assistant Vice President, CFO and Controller  
David Gift, Vice Provost, Libraries, Computing and Technology  
Rene Stewart O'Neal, Director, University Planning