



Planning, Budgeting, and Assessment Schedule

- This schedule will be maintained by the Office of Institutional Effectiveness (OIE) to reflect accurate information, particularly deadlines, which are relied upon by administrators, deans, program chairs, program directors, and faculty.
- It will be available on the University’s website and disseminated at the University’s Annual Strategic Planning Retreat (SPR) held in June/July or at the first Institutional Effectiveness Committee (IEC) in August/September.

Month	University Level	Unit/Division Level
August	<ul style="list-style-type: none"> • Revision/Extension of Strategic Plan completed • Faculty/Staff Conference • Presentation of goals and initiatives for new Academic Year 	<ul style="list-style-type: none"> • Department/Program Planning, Budgeting, and Assessment Committees formed
September	<ul style="list-style-type: none"> • Materials distributed to Division/Department/Unit Budget Managers to build budget Pro Forma (for next fiscal year) • Development of revenue projections (September - November) 	<ul style="list-style-type: none"> • Academic Department chairs/program directors & faculty begin to prepare <u>selected</u> Program Reviews for the last 3-5 academic years, due to respective deans May 15th and subsequently OIE June 15th • Final revisions, if necessary, of all annual OA reports from prior academic year, submitted to OIE by September 15th • OIE gives IEC a verbal status update of Program Reviews from Spring • Programs revise assessment plans to include any new expected outcomes and assessment methods (September-October)

October	<ul style="list-style-type: none"> • Development of revenue projections (September - November) 	<ul style="list-style-type: none"> • Academic Department chairs/directors & faculty continue preparation for Program Reviews due to respective deans May 15th, and subsequently OIE June 15th • Deans review finalized Spring Program Reviews • Finalized Spring Program Reviews submitted to Office of Institutional Effectiveness • Programs revise assessment plans to include any new expected outcomes and assessment methods (September-October)
November	<ul style="list-style-type: none"> • Development of revenue projections (September - November) • External finance audit completed • Budget expenditures projected • Budget Committee/Cabinet balances budget for presentation to the BOT • Budget pro forma revised to include new positions based on anticipated growth, new program development, and salary increases 	<ul style="list-style-type: none"> • Conduct end of course assessments that measures student learning outcomes (SLO's) for Fall semester
December	<ul style="list-style-type: none"> • Information presented to the BOT • Audit Report - Approval of Strategic Initiatives • Current year budget status • Fiscal Year comparisons (i.e. Oct. 31 to Oct. 31 revenue/expenses) • Budget approval <ul style="list-style-type: none"> - Set housing and tuition rates - Expenditures based on pro forma - Balanced budget 	<ul style="list-style-type: none"> • Academic Units/Divisions conclude all standardized and institutionally developed assessments of student learning outcomes (SLO's) for Fall semester • Administrative Units/ Divisions/Departments conclude assessment of operational outcomes for Fall semester • IEC receives Assessment Survey Triangulation Report • IEC receives a verbal update from the Director of Assessment regarding Program Reviews due to

		<p>respective deans May 15th and subsequently OIE June 15th (Dec. - Mar.)</p>
January	<ul style="list-style-type: none"> • Finance Department reviews budgetary process with Vice Presidents and Deans, which aids in the Pro-Forma Budget Process 	<ul style="list-style-type: none"> • Chairs/Deans conduct faculty evaluations. These evaluations include workload analysis; teaching, research/ service, class size, majors, & etc. (January - February) • IEC receives a verbal update from the Director of Assessment regarding Program Reviews due to respective deans May 15th and subsequently OIE June 15th (Dec. - Mar.)
February	<ul style="list-style-type: none"> • Budget refinement 	<ul style="list-style-type: none"> • Chairs/Deans continue conducting faculty evaluations. These evaluations include workload analysis; teaching, research/ service, class size, majors, & etc. (January - February) • IEC receives a verbal update from the Director of Assessment regarding Program Reviews due to respective deans May 15th and subsequently OIE June 15th (Dec. - Mar.) • Academic Council receives a verbal update of Program Reviews in process and upcoming Program Reviews from the Director of Assessment (Feb. - Mar.)
March	<ul style="list-style-type: none"> • Budget refinement 	<ul style="list-style-type: none"> • If needed, IEC proposes revisions to Division and Unit Mission Statements, which is implemented by appropriate committees • IEC receives a verbal update from the Director of Assessment regarding Program Reviews due to respective deans May 15th and subsequently OIE June 15th (Dec. - Mar.)

April		<ul style="list-style-type: none"> • Conduct end of course assessments that measure student learning outcomes (SLO's) for Spring semester • Begin Preparation for Annual SPR, which occurs in June or July (TBD) • Assessment of Academic Advisors completed by Advisees
May	<ul style="list-style-type: none"> • Mission Statement reviewed by the Board of Trustees (BOT) • Institutional Budget approved by the BOT • Staff reappointment offers extended • External finance audit performed 	<ul style="list-style-type: none"> • Academic Units/Divisions conclude all standardized and institutionally developed assessments of student learning outcomes (SLO's) for Spring semester • Administrative Units/Divisions conclude assessment of expected operational outcomes • Spring Program Reviews from <i>selected</i> Academic departments and/or programs due to respective deans by May 15th and subsequently OIE on June 15th • Annual Outcomes Assessment reports (OAs) for all academic programs due to school deans by May 15th and subsequently OIE on May 30th, <i>excludes</i> DCOM and DSOL (submit June 15th) • Deans submit annual OAs for all academic programs to OIE by May 30th, <i>excludes</i> DCOM and DSOL (submit June 15th)
June	Fiscal Year ends (June 30 th)	<ul style="list-style-type: none"> • Program Reviews from <i>selected</i> Academic departments and/or programs due to OIE by June 15th • Annual OAs for all Administrative and Academic Support Units, <i>including</i> DCOM & DSOL, due to deans and OIE by June 15th • Deans from DCOM and DSOL submit annual OAs for all academic support units to OIE by June 30th

		<ul style="list-style-type: none"> • OIE prepares report on completed Program Reviews and environmental scan for SPR (June/July)
July	<ul style="list-style-type: none"> • Fiscal Year begins (July 1st) • Strategic Planning Retreat <ul style="list-style-type: none"> - Initiate revision/extension of LMU Strategic Plan - Review past year fiscal outcomes - Progress reports for each Strategic Goal - SWOT analysis and Environmental Scan reviewed - Outcomes of Academic programs & Administrative services reviewed 	<ul style="list-style-type: none"> • Divisions/Departments/Units prepare progress reports for respective vice presidents • Vice presidents prepare Progress Reports for SPR (prior to June 30th)