

**Master Planning Calendar (revised April 2014)**

<u>Month</u>	<u>Strategic Planning</u>	<u>Performance Reporting</u>	<u>Five-Year Academic Programs Plan (Odd Years) and Statewide Program Responsibilities List</u>	<u>Budgeting</u>	<u>Administrative Rules/Legislation</u>	<u>Communications</u>
<b>Jan</b>	Agencies and Institutions start updating their strategic plan based on SBOE guidance and strategic plan.	The SBOE reviews NWCCU accreditation results as available.		Board presents budget to the legislature	Rules and legislation are presented to the legislature	SBOE presentations to JFAC  Higher Education legislative luncheon  OSBE distributes annual Fact Book to legislators  OSBE Financial Aid/FAFSA Awareness
<b>Feb</b>				Line item categories are developed and reviewed by the Presidents' Council and the BAHR Committee		OSBE presentation to germane committees
<b>Mar</b>	Agencies and Institutions finalize their strategic plan updates for submission to the SBOE prior to <b>April</b> agenda cutoff.	Institutions and agencies revise performance measures and benchmarks to align with strategic plan.  <b>Early-April</b> agencies and institutions submit <u>proposed</u> performance measures/benchmarks (including continued use of current measures, if appropriate) for review/approval by OSBE. (Note: These measures are for the fiscal year beginning July 1)	Institutions submit the Notice of Proposed Programs to OSBE and are shared with institutions.  Institutions start working through program concerns identified from other institutions.  Institutions submit a draft of proposed updates to their statewide program list to OSBE and those lists are shared with institutions.			
<b>Apr</b>	SBOE reviews and approves updated institution and agency strategic plans.  OSBE/SBOE receives final DFM strategic plan guidance	SBOE/OSBE receives final DFM performance reporting guidance (for governed agencies and institutions).  SBOE reviews and approves agency and institution <u>proposed</u> performance measures and benchmarks through strategic plan approval.	Work Session with Provosts and Regional Representatives to review and discuss proposed programs for the Five-Year Plan and updates to the statewide program list.  Work Session Follow Up – institutions will make necessary corrections to program entries and any edits to statewide program list based on discussion at work session.	SBOE is briefed on next FY legislative appropriations as it impacts education agencies and institutions.  SBOE approves line item categories for the institutions.	SBOE is briefed on new legislation as it impacts education agencies and institutions.  OSBE meets with institution government affairs directors regarding impact of legislation and off-session legislative strategy	

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			Institutions must provide feedback on proposed programs and statewide program list in late April.			
<b>May</b>	SBOE Conducts SBOE Governed institutions Presidents evaluations  Executive Director Conducts Agency Heads evaluations.		CAO will review plans and statewide program list for alignment. If changes and/or recommendations to the Board are made, CAO will take those to IRSA Committee at their June Meeting.	Agencies and institutions submit estimated <u>line items</u> to OSBE prior to <b>June</b> Board agenda cutoff.	Agencies and institutions submit legislative ideas and suggestions to OSBE prior to <b>June</b> Board agenda cutoff.	
<b>Jun</b>	SBOE makes any final adjustments in agency and institution strategic plans.	Board approves institution and agency performance measures through the strategic plan approval. Performance Measure reports must use approved performance measures from the strategic plans.	Draft Five-Year Plans and statewide program lists are presented to IRSA.  *As needed, a joint presentation from Department of Labor, Department of Commerce, and Idaho Workforce Development Council on workforce projections and educational needs will be provided at IRSA's Committee June Meeting.	OSBE provides MCO budget guidelines and templates to the agencies and institutions for submission (prior to <b>August</b> Board agenda deadline).  SBOE reviews agency and institution <u>line item</u> requests.  SBOE reviews and approves agency and institution <u>line item</u> requests.	SBOE reviews, approves, and provides guidance concerning <u>proposed</u> agency and institution legislative ideas.  Board approves proposed administrative rules	SBOE meets with legislators in Eastern Idaho (Idaho Falls)
<b>Jul</b>	OSBE submits SBOE approved agency and institution strategic plans (revised if required by the Board) to DFM by the <b>early-July</b> deadline.		Institutions finalize any remaining changes to plans and statewide program lists as reviewed and discussed and will submit to OSBE prior to <b>August</b> Board agenda cutoff.	Agencies and institutions submit estimated MCO budget to OSBE prior to <b>August</b> Board agenda deadline.	New legislation from prior session takes effect July 1.  Department of Administration publishes proposed rules and 21 day review period is commenced.	
<b>Aug</b>		Agencies and institutions submit agency and institution performance reports to OSBE in <b>late-August</b> . Performance Measure reports include Board required system wide performance measures and performance measures approved from the strategic plans.	Final Five-Year Plans and statewide program lists are presented to the full Board.	SBOE reviews and approves <u>final</u> budget request for next FY.  Draft budget request input to DFM automated system (by agencies and institutions) with a copy of supporting materials sent to OSBE.  OSBE reviews agency and institution budget submissions to ensure	OSBE submits legislative ideas to DFM prior to the required <b>early-August</b> deadline.  Governor's Office and DFM review legislative ideas.  OSBE begins development of approved legislative ideas into draft legislation (as appropriate).	SBOE meets with legislators in Southern Idaho (Twin Falls) and Eastern Idaho (Pocatello)  SBOE begins planning for annual Fact Book

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				compliance with SBOE guidance.  In <b>late-August</b> all budget documents returned to OSBE for final submission to DFM and LSO.	Board approves any proposed administrative rules not approved in June.	
<b>Sep</b>	SBOE conducts self-assessment.	OSBE submits agency and institution performance reports to DFM by the required <b>early-September</b> deadline.	OSBE provides inventory of current programs for reconciliation.  OSBE provides institutions with current statewide program list for updates.	Final budget requests forwarded to DFM and LSO by <b>September 1st</b> deadline.	Proposed (final draft) legislation is due to DFM about <b>mid-September</b> .  Department of Administration publishes proposed rules and 21 day review period is commenced.	OSBE planning for College Application Week
<b>Oct</b>	SBOE reviews Statewide k-20 draft strategic plan.  SBOE reviews self-assessment and makes recommendations for improvements.	SBOE reviews performance data from institutions and agencies for the previous year. Review forms the basis for revising strategic plan.	Institutions submit the Notice of Current Program Inventory.  OSBE provides the Notice of Proposed Programs list to institutions for updates.		-Proposed legislation is approved by SBOE. DFM forwards to LSO by <b>mid-October</b> .  Board approves Pending Rules, modifications are made based on public comment.	SBOE meets with legislators in North Idaho (Lewiston/Moscow)
<b>Nov</b>	Staff develops and finalizes (in collaboration with the agencies and institutions) the next annual update to the strategic plan.	OSBE updates performance measures to align with the Board's strategic plan.			Proposed legislation in <b>bill format</b> returned by LSO to OSBE for review and final changes.  Pending rules not approved in October are approved. Pending rules are submitted to the legislature for consideration. Temporary rules take effect when approved by the Board. Pending rules take effect at the end of the legislative session.	OSBE annual College Application Week
<b>Dec</b>	SBOE review and approves the annual updated/revision to the Board's strategic plan for the next FY.				<b>Early-December</b> is the final date for changes to bills (legislative proposals). Bills with substantive changes are resubmitted to SBOE for approval.	SBOE meets with legislators in North Idaho (Coeur d'Alene)  OSBE finalizes annual Fact Book

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						OSBE coordinates with institutions on JFAC presentations