

Master Planning Calendar (May 2017)

Month	Strategic Planning	Performance Reporting	Five-Year Academic Programs Plan (Odd Years) and Statewide Program Responsibilities List	Budgeting	Administrative Rules/Legislation	Communications
Jan	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 OSBE distributes annual Fact Book to legislators OSBE Financial Aid/FAFSA Awareness
Feb	Board approves K-20 Education Strategic Plan (if not approved in December)			Line item categories are developed and reviewed by the Presidents' Council and the BAHF Committee		OSBE presentation to germane committees
Mar	Agencies and Institutions finalize their strategic plan updates for submission to the SBOE prior to April agenda cutoff.	Institutions and agencies revise performance measures and benchmarks to align with strategic plan. Early-April 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.			
Apr	SBOE reviews and approves updated institution and agency strategic plans or requests revision and resubmittal for June Board meeting. OSBE/SBOE receives final DFM strategic plan guidance	SBOE/OSBE receives final DFM performance reporting guidance (for 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. Institutions must provide feedback on proposed programs and statewide program list in late April.	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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May	SBOE Conducts SBOE Governed institutions Presidents evaluations SBOE reviews self-assessment and makes recommendations for improvements. Executive Director Conducts Agency Heads evaluations. Institution/Agency strategic plans are submitted by June Board agenda cutoff for final approval if applicable.		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 June Board agenda cutoff.	Agencies and institutions submit legislative ideas and suggestions to OSBE prior to June Board agenda cutoff.	
Jun	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 August 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 OSBE submits legislative ideas to DFM prior to the required July 14 deadline.	SBOE meets with legislators in Eastern Idaho (Idaho Falls)
Jul	OSBE submits SBOE approved agency and institution strategic plans (revised if required by the Board) to DFM by the early-July deadline.		Institutions finalize any remaining changes to plans and statewide program lists as reviewed and discussed and will submit to OSBE prior to August Board agenda cutoff.	Agencies and institutions submit estimated MCO budget to OSBE prior to August 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. Governor's Office and DFM review legislative ideas. OSBE begins development of approved legislative ideas into draft legislation (as appropriate)	

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					for consideration at August Board meeting. Legislative language submitted by August agenda cutoff.	
Aug		Agencies and institutions submit agency and institution performance reports to OSBE in early-August . 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 final 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 compliance with SBOE guidance. In late-August all budget documents returned to OSBE for final submission to DFM and LSO.	Board approves any proposed administrative rules not approved in June. Proposed legislation is approved by SBOE. Proposed (final draft) legislation is due to DFM mid-August .	SBOE meets with legislators in Southern Idaho (Twin Falls) and Eastern Idaho (Pocatello) SBOE begins planning for annual Fact Book
Sep	SBOE conducts self-assessment.	OSBE submits agency and institution performance reports to DFM by the required early-September 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 September 1st deadline.	Department of Administration publishes proposed rules and 21 day review period is commenced.	OSBE planning for College Application Week
Oct		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.		DFM forwards to LSO by mid-October . Board approves Pending Rules, modifications are made based on public comment.	SBOE meets with legislators in North Idaho (Lewiston/Moscow)
Nov	Staff develops and finalizes the annual update to the strategic plan.	OSBE updates performance measures to align with the Board's strategic plan.			-Proposed legislation in bill format returned by LSO to OSBE for review and final changes. -Pending rules not approved in October are approved. (Special Board Meeting). Pending rules are submitted to the legislature for consideration. Temporary rules take effect when approved by the Board. Pending rules take effect	OSBE annual College Application Week

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					at the end of the legislative session.	
Dec	SBOE reviews and approves the annual updated/revision to the Board's strategic plan for the next FY.				Early-December 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 -OSBE coordinates with institutions on JFAC presentations