

EOU Annual Planning, Effectiveness, & Assessment Calendar

PFY=Previous Year, CFY=Current Year, FFY=Future Fiscal Year |

*List of programs participating excludes those conducting longitudinal reviews

Month	Budget Process Prev/Current Yr Future Yr	Effectiveness Process	Annual Program Review*	Longitudinal Academic Program Review	Academic Professional Development	Student Learning Assessment
Jul	<ul style="list-style-type: none"> Final allocation from the legislature, necessary budget adjustments via Cabinet. Final budgets loaded into FIS Banner budget managers notified. Final operating budget posted to the budget website and the campus is notified.* <p>* Assumes BOT approves the operating budget in May or June.</p>	<ul style="list-style-type: none"> Departmental annual KPI reports due to division heads by July 5 Division KPI reports and action plans due to President by July 20 ACC reviews division KPI reports and action plans and initiates mission-fulfillment related activity as needed 	•	<ul style="list-style-type: none"> Discussion of possible changes in process and/or template 	<ul style="list-style-type: none"> Online Workshops focused on Student Engagement. Individualized & small groups trainings focused on enhancing use of educational technology to improve student engagement & on Instructional Design, with Teaching & Learning Technology Coordinator (TLC), responsive to requests. 	<ul style="list-style-type: none"> Planning for improvement* <p>*Based on discussion of assessment results and other contextual information (NSSE, FSSE, program action plans, peer practices, NWCCU expectations, AAC&U current topics, etc.)</p>
Aug	<ul style="list-style-type: none"> VPFA and Director of Budget & Payroll evaluates performance from prior fiscal year and reports to the Cabinet, including evaluation of accomplishment of strategic initiatives. Variances between original budget and year-end financial results are analyzed and explained. 	<ul style="list-style-type: none"> Board of Trustee retreat - strategic priorities potentially discussed (First week of August) Cabinet uses division KPI reports and action plans to discuss future year(s) focus at annual retreat (mid-August) Focus areas translated by Cabinet members to division level priorities (shared with direct reports by start of fall term) Division level annual reports finalized (Aug 31) 	•	<ul style="list-style-type: none"> Changes implemented (as applicable) 	<ul style="list-style-type: none"> Summer Teaching Institute held last week of August. Online Workshops focused on Student Engagement. Individualized & small groups trainings focused on enhancing use of educational technology to improve student engagement & on Instructional Design, with TLC, responsive to requests. 	<ul style="list-style-type: none"> Finalize course assessment lists for current AY
Sep	<ul style="list-style-type: none"> Final operating budget presented to the F&A. Budget performance evaluations/variances from prior year shared with department budget managers. 	•	•	•	<ul style="list-style-type: none"> Individualized & small groups trainings focused on enhancing use of educational technology to improve student engagement & on Instructional Design, with TLC, responsive to requests. Trainings on assessment process (general for all faculty, specific for selected faculty) 	<ul style="list-style-type: none"> Assessment notifications to selected faculty (Course, Term) Program discussions on 'closing the loop' (prev Spring) Statements entered into Campus Labs (prev Spring courses)

<p>Oct</p>	<ul style="list-style-type: none"> Final operating budget presented to B&P Committee. Variances between prior year original budget and year-end financial results are analyzed and explained to B&P and F&A committees. Cabinet prepares and discusses a list of strategic funding targeted areas based on the EOU Strategic Plan. Funding priorities help determine the overall direction of budget allocations and will be used as performance measures when evaluating final budget performance. Budget allocations will be responsive to the revenue per student/SCH enrollment projections as well as campus and Board goals. 	<ul style="list-style-type: none"> 	<ul style="list-style-type: none"> 	<ul style="list-style-type: none"> Templates loaded into Campus Labs Program leads trained in the system 	<ul style="list-style-type: none"> Workshop focused improvements identified in previous year's SLO Assessment—College levels. Individualized & small groups trainings focused on enhancing use of educational technology to improve student engagement & on Instructional Design, with TLC, responsive to requests. Teaching and Learning Technology Roundtables. 	<ul style="list-style-type: none">
<p>Nov</p>	<ul style="list-style-type: none"> Board approves final operating budget at first meeting in the fall. Prior year base budget, 3-year expenditure history, and prior year quarter 4 management report are shared with the B&P Committee for review and feedback. Budget Office prepares a 3-year budget pro forma based on key assumptions for Education and General funded operations. The Vice President for Finance and Administration (VPFA) meets with the Cabinet to review the assumptions and the pro forma. The Cabinet will share additional strategic funding goals, possible initiatives and projected funding pool, if necessary. 	<ul style="list-style-type: none"> Institutional Annual Report is updated 	<ul style="list-style-type: none"> KPI data provided to programs (includes quantitative and qualitative measures e.g. enrollment, retention, GLO's, PLO's, DEI, % courses using OERs, information literacy, etc.) Programs review KPI data and begin conversations for improvement 	<ul style="list-style-type: none"> Data loaded into Campus Labs (KPIs and Financial data) Programs begin review 	<ul style="list-style-type: none"> Individualized & small groups trainings focused on enhancing use of educational technology to improve student engagement & on Instructional Design, with TLC, responsive to requests. Trainings for use of new Educational Technology. Teaching and Learning Technology Roundtables. 	<ul style="list-style-type: none"> Fall assessments due (10th week)

	<ul style="list-style-type: none"> Future biennial draft budget and strategic funding initiatives are shared with the B&P Committee for review and feedback. 					
Dec	<ul style="list-style-type: none"> 	<ul style="list-style-type: none"> Institutional Annual Report to Cabinet 	<ul style="list-style-type: none"> Deans have discussions with programs to refine action plans Budget requests relative to action plans are submitted to Provost 	<ul style="list-style-type: none"> 	<ul style="list-style-type: none"> Follow-up training for faculty uninvolved in learning assessment Trainings for use of new Educational Technology. Individualized & small groups trainings focused on enhancing use of educational technology to improve student engagement & on Instructional Design, with TLC, responsive to requests. 	
Jan	<ul style="list-style-type: none"> Planning units submit budget proposals for increases/ decreases/ reallocations of E&G General Fund operations to their Vice President/ President. During this phase, units may submit requests for new programs. These requests must be submitted and vetted through the appropriate unit VP, and will provide details regarding economic impact on the institution, including: 1) Impact on FTE/SCH 2) Program Costs/Revenue 3) Outcomes of investments. Vice Presidents/Presidents aggregate budgets from their areas, and each prepares a budget for their area showing increases/ decreases/ reallocations according to budget instructions. VPFA and the Director of Budget and Payroll will meet individually with the department budget managers 	<ul style="list-style-type: none"> Mid-year updates on progress at division level shared at Cabinet Institutional Annual Report presented to BoT 		<ul style="list-style-type: none"> 	<ul style="list-style-type: none"> Teaching and Learning Technology Roundtables. Trainings for use of new Educational Technology. Individualized & small groups trainings focused on enhancing use of educational technology to improve student engagement & on Instructional Design, with TLC, responsive to requests. Workshops focused improvements identified in previous year's SLO Assessment—College levels. 	<ul style="list-style-type: none"> Program discussions on 'closing the loop' Statements entered into Campus Labs (Fall courses)

	<ul style="list-style-type: none"> for clarification of the budget requests. In consultation with the vice president for finance and administration and the director of budget and payroll, president issues President's Recommended Budget (PRB). 					
Feb	<ul style="list-style-type: none"> VPFA presents the PRB (E&G) to the F&A Board Committee and the EOU B&P Committee for review and feedback. 	<ul style="list-style-type: none"> B&P receives results from annual reports (IAR & division summaries) and identified priorities (Cabinet) and uses those to make budget allocation recommendations 	<ul style="list-style-type: none"> 	<ul style="list-style-type: none"> Draft review due to Dean 	<ul style="list-style-type: none"> Teaching and Learning Technology Roundtables. Trainings for use of new Educational Technology. Individualized & small groups trainings focused on enhancing use of educational technology to improve student engagement & on Instructional Design, with TLC, responsive to requests. 	<ul style="list-style-type: none">
Mar	<ul style="list-style-type: none"> VPFA takes feedback from PRB and prepares a draft operating budget of all funds for presentation to F&A and B&P. 		<ul style="list-style-type: none"> 	<ul style="list-style-type: none"> Review finalized (includes action plans) 	<ul style="list-style-type: none"> Trainings for use of new Educational Technology. Individualized & small groups trainings focused on enhancing use of educational technology to improve student engagement & on Instructional Design, with TLC, responsive to requests. 	<ul style="list-style-type: none"> Winter assessments due (10th week)
Apr	<ul style="list-style-type: none"> VPFA presents final read of the draft operating budget to the Cabinet for recommendation to B&P. Budget and Planning review and make recommendation to the President. The President recommends final budget to F&A Committee for recommendation to the full board. 		<ul style="list-style-type: none"> Program action plans for next year finalized based on feedback from budget requests 	<ul style="list-style-type: none"> Programs begin implementation of action plans as applicable/possible Collective debrief on process (Deans and program chairs) 	<ul style="list-style-type: none"> Institutional programming for professional development finalized for upcoming AY Trainings for use of new Educational Technology. Teaching and Learning Technology Roundtables. Workshops focused on improvements identified in previous year's SLO Assessment— College levels. 	<ul style="list-style-type: none"> Program discussions on 'closing the loop' Statements entered into Campus Labs (Winter courses)
May	<ul style="list-style-type: none"> VPFA presents the operating budget to the full EOU Board of Trustees for approval. 		<ul style="list-style-type: none"> Programs begin implementation of action plans as applicable/possible 	<ul style="list-style-type: none"> Programs selected for next year's review Presentation of summarized results to ASA committee 	<ul style="list-style-type: none"> Trainings for use of new Educational Technology. Final Teaching and Learning Technology Roundtables. 	

					<ul style="list-style-type: none"> • Individualized & small groups trainings focused on enhancing use of educational technology to improve student engagement & on Instructional Design, with TLC, responsive to requests. • Invitations sent out for Summer Teaching Institute and participants selected and notified by Institute Staff. • Planning for Summer Teaching Institute. 	
Jun	•	•	<ul style="list-style-type: none"> • Program action plans synthesized / summarized and incorporated into college annual effectiveness reports by the Deans 	<ul style="list-style-type: none"> • Program action plans synthesized / summarized and incorporated into college annual effectiveness reports by the Deans 	<ul style="list-style-type: none"> • Online Workshops focused on Student Engagement. • Trainings for use of new Educational Technology. • Individualized & small groups trainings focused on enhancing use of educational technology to improve student engagement & on Instructional Design, with TLC, responsive to requests. • Summer Teaching Institute Schedule set and sent to participants. 	<ul style="list-style-type: none"> • Spring assessments due (10th week)