**ANNUAL PLANNING, ASSESSMENT & BUDGET CALENDAR**

**SUMMER QUARTER**

**June/July/August**

Office of Institutional Planning and Effectiveness (IP&E) compiles data for integration into planning and assessment processes (full environmental scan every 2 years, summer data pull/e-scan update annually,).

Administrators compile assessment data consistent with their assessment plans. (Prompt at ISST meetings.)

IP&E provides data on progress of SEM strategies and corresponding enrollments as part of summer data pull.

ISST creates framework for SEM planning, including:

* SEM data (targeted enrollments)
* Planning Context (FTE allocation, FTE target projections, external variables, emerging target populations)
* Annual enrollment Management (EM) planning target

Make final adjustments to SEM targets based on Board approved budget/SBCTC enrollment allocation

Review prior fiscal year’s final expenditures & revenue patterns. Review current year revenue/expenses estimates. (Cabinet Plus in August)

Cabinet Plus Planning Session (1.5-2 days):

* Review last year’s planning/assessment process
* Review Operational Planning, Accreditation, Assessment & Budget Calendars
* Review core themes, objectives & indicators/measures of institutional performance. Recommend changes to BOT at summer retreat
* Review ISST’s SEM framework plan, including:
  + - * SEM data (targeted enrollments)
      * Planning context (FTE allocation, FTE projections, external variables, emerging target populations)
      * Annual Enrollment Management (EM) planning targets

Prep Employee Vision & Climate survey (biannually, odd years)

**Legend**

Black = Planning

Green = Budgeting

Brown = Strategic Enrollment Management (SEM)/ Annual Enrollment Planning

Blue = Institutional Assessments

Red = Pre-planning cues

Prep for BOT retreat

Identify time to *plan* Fall Cabinet Planning Session with TK.

Identify date for Fall Cabinet Planning Session.

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| **ANNUAL PLANNING, ASSESSMENT & BUDGET CALENDAR**  **FALL QUARTER** | | | | | | | | | | |
|  | | **SEPTEMBER** | **OCTOBER** | | | | **NOVEMBER** | | | **DECEMBER** |
|  | | Departments meet to review and interpret assessment data and complete departmental assessments. IP&E supports as requested.  BOT retreat – Review core themes, objectives & measures of institutional performance.  Departments and Areas start developing next year’s plans or emergent needs. (Send prompt.) ***IP&E provides plan template****.*  Instruction provides draft SEM plan to Recruitment, P&C, Marketing Committees and Units  IP&E administers the *SVC Employee Vision & Climate Survey* to the college community (biannually, odd years). | Departments and Areas continue developing next year’s plans or emergent needs. (Send prompt.)  Cabinet members to review tuition, fee, waiver requests with VP Admin Services (Send prompt.)  IP&E conducts ETS Survey (coordinate with Instruction and Assessment Liaison).  Begin prep for spring student survey – CCSSE (odd year) or Noel Levitz (even years) survey. Remind Instruction. | | | | Review all tuition, fee, waivers requests for at Cabinet Plus meeting before BOT meeting.  Department/Division/Area plans completed. (Send prompt to Cabinet.)  Non-SEM Committee Plans due to Cabinet member liaison. (Send prompt.)  Identify date for San Juan Planning Session (Unit Heads only, mid- to late February).  Cabinet Plus Planning Session (1 day):   * Review current year revenue/expenses estimates. * Cabinet develops annual draft enrollment targets: State, International, Running Start * ISST develops department/area targets for following year | | | Area Head plans due to Unit Head.  Non-SEM committee plans reviewed by Unit Heads and integrated with Unit plans.  SEM Committee Plans Completed, submitted to ISST.  Prep for Gelmon/ Carnegie (Jan-Mar administration, odd years only) |
| **ANNUAL PLANNING, ASSESSMENT & BUDGET CALENDAR**  **WINTER QUARTER** | | | | | | | | | | | | |
|  | | **JANUARY** | | | **FEBRUARY** | | | **MARCH** | | | | |
|  | | Unit Heads complete unit plans. Informal integration of plans prior to February Cabinet.  Instruction and WIC complete draft SEM plan and share with Recruitment, P&C and Marketing leads.  Prep for spring student survey – CCSSE (odd year) or Noel Levitz (even years) survey. Contact CCSSE/Noel-Levitz to order surveys. Set administration dates. Notify faculty. Advertise to students. | | | ISST SEM plan completed.  Unit Heads identify and prioritize “***Operational Plan***” items, and required budget amounts.  IP&E produces public version of ***SEM Operational Plan.***  Review current year revenue/expenses estimates. (Cabinet Plus)  Unit Head Planning Session (San Juan):   * Unit Heads integrate unit plans, the Facilities Master Plan, IT and SEM plans, and College Committee and Strategic Priorities Committees, and identify planning priorities***.*** * Draft ***Operational Plan*** with Cabinet follow-up assignments.   IP&E conducts Gelmon/Carnegie assessment between Jan-April (biannually, odd years)  Units communicate Op Plan and San Juan discussions to departments/divisions/areas. | | | President shares draft ***Operational Plan*** with the College community.  Unit Head Planning Session (Follow-Up):   * May require 2-3 sessions. * Allow 6 weeks between San Juan & Padilla Bay meetings (may carry over into April) * Identify potential budget impacts of Operational Plan. Unit Heads provide Admin Services with actual costs of all items approved at San Juan prior to Follow-Up. * Finalize ***Operational Plan***   Make plan for establishing/updating unit assessment plans in spring quarter.  Units communicate Op Plan and budget discussions to departments/divisions/areas.  IP&E conducts ETS Survey (coordinate with Instruction and Assessment Liaison). | | | | |
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| **ANNUAL PLANNING, ASSESSMENT & BUDGET CALENDAR**  **SPRING QUARTER** | | | | | | | | | | | |
|  | **APRIL** | | | **MAY** | | | | **JUNE** | | | |
|  | President confirms ***Operational Plan*** with the College community.  Units communicate Op Plan and budget discussions to departments/ divisions/ areas.  IP&E produces public version of ***Operational Plan.***  Departments update unit assessment plans.  IP&E administers Noel-Levitz or CCSSE student survey.  Identify date for Summer Cabinet Planning Session.  Identify time to plan Summer Cabinet Planning Session.  Identify time to plan BOT retreat. | | | President presents the annual ***Operational Plan*** to the Board.  Board study session:   * Operational Plan * Budget * S&A   Admin Services prepares preliminary budget.  President presents preliminary budget information to the Board.  Admin Services reviews draft budgets with budget managers.  IP&E confirms SEM assessment indicators with Cabinet. | | | | Board of Trustees considers the budget and Operational Plan for approval.  IP&E solicit feedback and compile list for summer data pull and Environmental scan.  Prep for Cabinet Summer Planning Session (June/July/Aug). | | | |