



Office of Institutional Effectiveness

2016-2017 Calendar for Integrated Planning and Assessment Processes:

Annual Goals and Reports // Budget Planning // Strategic Plan Assessment // Middle States Periodic Review Report

Updated Nov 2, 2016

Date	Mission & Strategic Plan Assessment Process	Annual Goals and Report Process	Budget Planning Process	Middle States Periodic Review Report (PRR)
Wed, Sep 15, 2016				Middle States PRR¹ Steering Cmte reviews Chap 2 draft and prepares for Chap 3
By Friday, Sep 30, 2016		Summer 2016 AAC² & IEC² Assessment Cmtes feedback reports sent to Chairs, Deans, Admin.	(1) Discuss and agree upon Prior Prior Year Administrative Approach (2) Develop new strategies and funding level requests for Student Fees (3) Review Prior Year Budget Workshop Initiatives for approval	
Thurs, Oct 13, 2016	Trustee Mission and Strategic Planning Committee reviews status of Strategic Plan Assessment (SPAAG ³) and KPI Dashboard		Board of Trustees provided with FY 2017 Operating Budget Projection and Prior Prior Year (1) Determine Comprehensive Compensation Adjustments for FY 2017 (2) Complete planning for prior year business plans - new programs - FY 2017	
Wed, Oct 19, 2016				Middle States PRR Steering Cmte reviews Chap. 3 draft
Thurs, Oct 20, 2016			Based on Consultant's Report, VPs for Finance, Enrollment Management and Provost set the Enrollment Managements overall goals	
Thurs, Oct 27, 2016			VP for Finance presents Proposed Budget Assumptions to President's Cabinet for preliminary review	
By Friday, Oct 28, 2016		<u>Deadline:</u> Acad. Dept. Chairs and Program Directors enter Program Learning Goals and Curr. Map to Taskstream		

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Wed, Nov 2, 2016			VP for Finance presents Proposed Capital Plan to President's Cabinet for Preliminary Review	
Wed, Nov 16, 2016	SPAAG with MSCHE Steering Cmte review template for ⁴ SPII Core Goals 1, 2 & 3			Middle States PRR Steering Cmte reviews outlines of Chapter 5 and 6.
Thurs, Nov 17, 2016			Finance Office develops Core Revenue and Expense Models with agreed upon Enrollment Management and Financial Aid Scenarios	
Wed, Nov 30, 2016		<p>Vice Presidents review 2016-17 Annual Goal activity and identify 2017-18 Annual Goals and Resource Requests.</p> <ul style="list-style-type: none"> • Chairs, Program Dtrs, & Staff enter 2017-18 Annual Goals in Taskstream by Feb 3, 2017 • Deans and Directors by Feb 17, 2017 	<ul style="list-style-type: none"> • President's Cabinet discussed first draft of Multi-Year Operating and Capital Budget Model with Projected Assumptions • Review and approve the Three Year Budget Model (FY18-FY20) 	
Dec 1-15, 2016		<ul style="list-style-type: none"> • Taskstream Training¹ available 	Position Control reviews conducted by Vice-Presidents and Provost for determination of accuracy	
Thurs, Dec 15, 2016			<u>Deadline:</u> Vice-Presidents and Provost certify employee Position Control for 2017-18	
Thurs, Dec 8, 2016	Trustee Mission and Strategic Planning Committee reviews status of Strategic Plan Assessment (SPAAG ³) and KPI Dashboard		Board of Trustees reviews and approves the Three Year Budget Projection (FY18-FY20)	

¹ December 1, 6, and 15 from 12:00-1:00pm and from 3:30-4:30pm in O'Malley Library, room #410 by previous appointment (assessment@manhattan.edu)

<https://inside.manhattan.edu/offices/institutional-effectiveness/>

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Thurs, Dec 21, 2016	SPAAG with MSCHE Steering Cmte review template for ⁴ SPII Core Goals 1,2 & 3			Middle States PRR Steering Cmte reviews Chapter 5 and 6 drafts and disseminate to College community.
Wed & Thursday Jan 4 th and 5 th		Annual Goals & Resource requests in Taskstream Training Sessions 12-1pm TBD		
Wed & Thursday Jan 11 th and 12 th		Annual Goals & Resource requests in Taskstream Training Sessions 12-1pm TBD		
Wed, Jan 18 th , 2017		Annual Goals & Resource requests in Taskstream Training Sessions 12-1pm TBD		Middle States PRR Steering Cmte reviews feedback from MC community
Thurs, Jan 19 th , 2017		Annual Goals & Resource requests in Taskstream Training Sessions 12-1pm TBD	Sr. Administrator Meeting-Budgeting Process 9:30am-11:30am Kelly Commons 5C	
Wed & Thursday Jan 25 th and 26 th		Annual Goals & Resource requests in Taskstream Training Sessions 12-1pm TBD		

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Mon, Jan 30, 2017			Initial Opening Meeting and Instructions: Cost Center Managers provide Finance Office budget adjustment requests for FY18 – activate Taskstream process and instructions <ul style="list-style-type: none"> • Launch Self Service Budget Tool for Organizational Budget Development and Accuracy • Review Position Control for accuracy with Cost Center Managers for position adjustments and new position requests 	
Wed & Thursday Feb 1 st and 2 nd		Annual Goals & Resource requests in Taskstream Training Sessions 12-1pm TBD		
Fri, Feb 3, 2017		<ul style="list-style-type: none"> • Deadline: Pre-Tenured Faculty Members provide individual 2016-17 Faculty Report to Chair/Program Dtr, Dean, and Provost • Deadline: Chairs, Program Directors, & Staff enter 2017-18 Annual Goals & Resource requests in Taskstream for Dean and Dtr Review 		
Wed, Feb 15, 2017	SPAAG with MSCHE Steering Cmte reviews template for ⁴ SPII Core Goals 1, 2 & 3			Middle States PRR Steering Cmte reviews draft that includes MC community feedback.

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Fri, Feb 17, 2017		<u>Deadline: Deans and Directors</u> enter 2017-18 Annual Goals & Resource requests in Taskstream for Vice President/Provost review.		
Mon, Feb 27, 2017		<u>Deadline: Vice Presidents/Provost</u> enter 2017-18 Annual Goals & Resource requests in Taskstream for President	<u>Deadline: Cost Center Managers</u> finalize Position Control for new position requests and adjustments; finalize budget adjustment requests with the Finance Office	
Wed, Mar 8, 2017			<u>Complete Final Draft of Core Revenue and Expense Model: President's Cabinet discussion</u> related to our strategies to prioritize proposed Strategic Initiatives for FY18 and beyond	
Mar 13-17, 2017	Spring Break	Spring Break	Spring Break	Spring Break
Wed, Mar 22, 2017	SPAAG with MSCHE reviews College-wide assessment activities	Cabinet Reviews and President circulates draft of College-wide 2017-18 Annual Goal priorities, requesting feedback from College Community by Apr 28, 2017		Middle States PRR Steering Cmte reviews College-wide assessment activities with SPAAG
Tues, Mar 28, 2017			Finance Office integrates efficiencies and effectiveness plan into each Budget Model	
Fri, Apr 14, 2017		<u>Deadline: Each Faculty Member</u> provides individual 2016-17 Faculty Report to Chair/PD, Dean, and Provost	Finalize Multi-Year Capital Plan	
Tues, Apr 18, 2017		President discusses draft of College-wide 2017-18 Annual Goal priorities with MC Senate	Finance and HR complete review of Promotions, New Position Requests, Exceptions, Leaves, Sabbaticals, Adjuncts, etc. and Develop Projections	

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Wed, Apr 19, 2017	SPAAG with MSCHE Steering Cmte review template for ⁴ SPII Core Goals 1, 2 & 3			Middle States PRR Steering Cmte reviews final PRR prior to June 1 st submission
Fri, Apr 28, 2017		<u>Deadline:</u> College Community to provide President feedback on draft of College-wide 2017-18 Annual Goals		
Wed, May 3, 2017			President's Cabinet Budget Workshop to determine final FY18 budget assumptions, proposed operating and capital budget and strategic initiatives to be funded	
Wed, May 17, 2017				Middle States PRR Steering Cmte concludes its work
Wed, May 24, 2017			President's Cabinet reviews and approves final FY18 budget with refined final operating and capital budget based on freshman, transfer and preliminary graduate results	Cabinet updated on PRR
Thurs, June 1, 2017				Deadline: Submit PRR
Thurs, June 8, 2017	Trustee Mission and Strategic Planning Committee reviews status of Strategic Plan Assessment (SPAAG ³) and KPI Dashboard		Board of Trustees reviews and approves Three Year Operating and Capital Budget (FY18-FY20)	
Fri, June 16, 2017		<u>Deadline:</u> Chairs/Program Dtrs provide 2016-17 Annual Dept/Program Report and Outcomes Assessment Report (OARs) to Dean in Taskstream		

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Friday, June 23, 2017		<u>Deadline: Deans and Directors</u> provide all 2016-17 Annual Reports to VPs/Provost in Taskstream.		
Fri, June 30, 2017		<u>Deadline: VPs/Provost</u> provide all 2016-17 Annual Reports (including division level from VP) to President in Taskstream.		
July 5-28, 2017		Academic Assessment Committee (AAC) reviews 2016-17 Annual Reports and OARs ⁵		
Tues & Wed, Aug 1-2, 2017		Academic Assessment Committee (AAC) provides feedback to College leaders.		
July 5-28, 2017		Institutional Effectiveness Committee (IEC) reads 2016-17 Annual Reports		
Wed, Aug 9, 2017		Institutional Effectiveness Committee (IEC) provides feedback to College leaders.		

¹ PRR is the Middle States Periodic Review Report. This is the 5 year interim report, following the 10 year self-study in 2012.

² Academic Assessment Committee (AAC) provides guidance to faculty assessing student learning and academic program effectiveness. The Institutional Effectiveness Committee (IEC) provides guidance to Administrators assessing effectiveness of Administrative Support Units.

³ Strategic Plan Assessment Advisory Group (SPAAG) includes designated representatives from the AAC and IEC, which meets four times per academic year to evaluate reports assessing each Core Goal of the strategic plan.

⁴ SPII is reference to the second phase of the Manhattan College Strategic Plan: Phase II 2015-2020, *Renewing the Promise 2025*.

⁵ Outcomes Assessment Report (OARs)