Winthrop University
Budget & Institutional Effectiveness Annual Cycle

Due No Later Than:	Activity/Submission
July 15th	Budget Office releases current year departmental budgets.
July – August	Prior year Institutional Annual Report is prepared and disseminated.
October 1st	Academic program/department annual reports including updated goals and resource needs with justifications due to college deans. Online update of previous academic year's Program Assessment Reports completed by program coordinators/dean/all department heads. Current year's Program Assessment Report updated in online system. Updated current year personnel base budget to Academic Deans.
November 1st	College annual reports submitted to VPAA and AAAS. Review of previous academic year's Program Assessment Reports by unit assessment committee and feedback provided to programs. Deans/Vice Presidents forward copies of reviews to AAAS.
November 15th	Board of Trustees adopts current year Vision of Distinction
December 1st	Deans submit updated goals and resource needs (budget and personnel) to VPAA for ALC discussion.
February 15th	Budget Office distributes the personnel base budget rosters for the current year. Functional Area Program Assessment Reports for previous academic year are finalized in the online Assessment Reporting System. Functional Area updates of the current academic year Program Assessment Reports submitted via online system and plan for the new year entered.
March 1st	Budget Request and Planning Reports (including suggested

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	institutional, divisional, college and department goals for the *Vision of Distinction*) for the upcoming year are due to college unit deans and other area department heads.
March 15th	Report internal personnel roster changes (i.e. retirements, resignations, and transfers) <u>not</u> receiving new funding to the Budget Office. Deans and other area department heads submit Budget Request and Planning Reports for the academic year to appropriate division Vice President.
April 1st	VPs meet with and deans/other department heads.
April 10th	Each Executive Officer forwards to the Budget Office top priority items with justifications. A list is compiled by the Budget Office and submitted to the President for consideration at an EO meeting.
April 15th	Budget Office submits the preliminary Allocation Status Report not including next year adjustments. Executive Officers meet to discuss priority list for the next year. Board of Trustees updated on the status of the budget development for the next year.
May 30th	Preliminary Allocation Status report is updated with adjustments recommended by the Executive Officers.
June 10th	Executive Staff submit year-end updates on goals and objectives to Executive Officers.
June 30th	Executive Officers and President finalize the Institutional objectives for the next academic year. Board of Trustees at scheduled June meeting is presented with an update on the current year's institutional objectives. Board of Trustees approves next year institutional budget based on goals and objectives.