# UM’s Strategic Planning and Assessment Cycle August-July

## Informed, Annual Refinement Implementation and Validation

## August

### Planning

ULC Retreat

* Refresh long-term perspective
* Reflect on last year
* Align vison and priorities

UPC presents refreshed PFA Strategies

UBC present last FY outcomes

### Budgeting

UBC reviews previous FY

### Operating Rhythm

State of the University

* Strategic progress goals and objectives

Cabinet and Shared Governance Meetings

ULC Meeting

### Assessment

UAAC performs ongoing assessment of mission fulfillment through institutional tracking of key indicators aligned with UM’s Priorities for Action

## September

### Planning

UPC meets to continually assess external trends, to assess our vision and priorities, and to ask if our PFA Strategies need refinement (in partnership with PFA teams)

### Budgeting

UBC communicates preliminary budget for next FY to unit and sector heads ( 2% held back for strategic reserve)

BOR approves current FY budget

### Operating Rhythm

Cabinet and Shared Governance Meetings

ULC Meeting

### Assessment

UAAC performs ongoing assessment of mission fulfillment through institutional tracking of key indicators aligned with UM’s Priorities for Action

## October

### Planning

UPC meets to continually assess external trends, to assess our vision and priorities, and to ask if our PFA Strategies need refinement (in partnership with PFA teams)

### Budgeting

BOR approves current FY budget

Deans and Sector Heads plan next FY budgets (Strategic Playbooks) and prepare January ULC presentations

VPOF and VPEMSC provides support and templates

### Operating Rhythm

Cabinet and Shared Governance Meetings

ULC Meeting

### Assessment

UAAC performs ongoing assessment of mission fulfillment through institutional tracking of key indicators aligned with UM’s Priorities for Action

## November

### Planning

UPC meets to continually assess external trends, to assess our vision and priorities, and to ask if our PFA Strategies need refinement (in partnership with PFA teams)

### Budgeting

Deans and Sector Heads plan next FY budgets (Strategic Playbooks) and prepare January ULC presentations

VPOF and VPEMSC provides support and templates

### Operating Rhythm

Cabinet and Shared Governance Meetings

ULC Meeting

### Assessment

UAAC performs ongoing assessment of mission fulfillment through institutional tracking of key indicators aligned with UM’s Priorities for Action

## December

### Planning

UPC meets to continually assess external trends, to assess our vision and priorities, and to ask if our PFA Strategies need refinement (in partnership with PFA teams)

### Budgeting

Deans and Sector Heads plan next FY budgets (Strategic Playbooks) and prepare January ULC presentations

VPOF and VPEMSC provides support and templates

### Operating Rhythm

Cabinet and Shared Governance Meetings

ULC Meeting

### Assessment

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## January

### Planning

ULC Retreat (2 days)

* UPC presents:
	+ External trends
	+ PFA Strategies refinement
* Deans and Sector heads (with UBC support) present:
	+ Strategic playbooks (three-year vision, budget, investment requests)

### Budgeting

UBC, Deans, Sector Heads present at ULC Retreat

### Operating Rhythm

Cabinet and Shared Governance Meetings

ULC Meeting

### Assessment

UAAC performs ongoing assessment of mission fulfillment through institutional tracking of key indicators aligned with UM’s Priorities for Action

## February

### Planning

### Budgeting

### Operating Rhythm

Mid-year leadership meeting (ULC, chairs, directors)

Cabinet and Shared Governance Meetings

ULC Meeting

### Assessment

UAAC performs ongoing assessment of mission fulfillment through institutional tracking of key indicators aligned with UM’s Priorities for Action

##  March

### Planning

### Budgeting

UBC reviews all Strategic Playbooks and makes recommendations to executive leadership (2% held back for strategic reserve)

### Operating Rhythm

Mid-year leadership meeting (ULC, chairs, directors)

Cabinet and Shared Governance Meetings

ULC Meeting

### Assessment

UAAC performs ongoing assessment of mission fulfillment through institutional tracking of key indicators aligned with UM’s Priorities for Action

## April

### Planning

### Budgeting

Budget Set

Submit next FY budget to OCHE

### Operating Rhythm

Cabinet and Shared Governance Meetings

ULC Meeting

### Assessment

UAAC performs ongoing assessment of mission fulfillment through institutional tracking of key indicators aligned with UM’s Priorities for Action

## May

### Planning

ULC Retreat

* UPC presents progress, updates, PFA Strategies
* UBC present final budget for next fiscal year

### Budgeting

Submit next FY budget to OCHE

### Operating Rhythm

Cabinet and Shared Governance Meetings

ULC Meeting

### Assessment

UAAC performs ongoing assessment of mission fulfillment through institutional tracking of key indicators aligned with UM’s Priorities for Action

## June

### Planning

UPC Retreat

* Assess external trends
* Align long-range vision
* PFA Strategies refinement (prep for August ULC retreat)

### Budgeting

Present next FY budget in executive session

### Operating Rhythm

Cabinet and Shared Governance Meetings

ULC Meeting

### Assessment

UAAC performs ongoing assessment of mission fulfillment through institutional tracking of key indicators aligned with UM’s Priorities for Action

## July

### Planning

UPC Retreat

* Assess external trends
* Align long-range vision
* PFA Strategies refinement (prep for August ULC retreat)

### Budgeting

### Operating Rhythm

Cabinet and Shared Governance Meetings

ULC Meeting

### Assessment

NWCCU Accreditation renewal in 2024