PLANNING CALENDAR

2017 Timeframe	Input and Information	Libraries Activity Planning	University Budget Planning	Output
January				
February				
March	Environmental factors such as user feedback, trends in publishing and higher education, statistical trend information (ACRL, ARL, IPEDs, etc.), and collection and service use.	Cabinet members complete templates for broad environmental scan of space, collections, services, and infrastructure needs. Conduct analyses such as SWOT. Items planned in previous cycles that are still necessary but not completed should be included.		Completed Local and Infrastructure Environmental Scan Templates [Due 3/24?]
	Local and Infrastructure Environmental Scans	**March 29th Retreat:** Review priorities and activities, look for themes and overlap. Assess infrastructure capacity and demands.		Refined local priorities and activities, and initial priorities for infrastructure.
April	Receive working Budget for FY2018	Cabinet members review and revise local priorities based on March retreat and begin to assess the impact of the budget information on priorities and infrastructure		
May	2018 budget information (Revised) Local priorities and activities Infrastructure capacity	**Mid/Late May Retreat:** Further refine local and infrastructure priorities and activities based on budget information. Identify priorities and activities for 2018 and items that may go forward for 2019 budget request.		Priorities and activities for 2018 Proposed budget request areas for 2019
June		Cabinet finalizes[i] 2018 local and librarywide priorities	Directors meet with CFOs to discuss 2018 plan (if necessary)[ii], 2019 priorities, and proposed/possible 2019 budget requests[iii]	2018 Priorities and activities
July		Assess 2017 University Goals and Metrics[iv]. Develop 2018 Goals and Metrics		2018 University Goals and Metrics

PLANNING CALENDAR

August			**August Retreat:** Finalize budget requests.	
September		Compile data and complete statistical assessment of FY17 finances[v]	Directors meet with CFOs to communicate regarding 2019 budget request.	
October				2019 Budget Request
November				
December				

[i] The 2018 budget must still be approved by the state so it may change.
[ii] This is necessary if budget reductions have caused us to reduce services in a manner that would be important for the CFO to understand.
[iii] This is an opportunity to understand the CFOs reaction to possible budget requests. What information will they need, whom else should be brought into the discussion, etc.
[iv] Not certain when these are due. Based on previous discussions, it seems like September is more realistic.
[v] This might be too late because the goals need to be reported in July. This needs to be clarified.

3/2/2017