UTMB Strategic Planning Cycle FY 2019

Planning Session Dates 2018 - 2019
- Sept. 24, 2018
- IPS I
- Jan. 28, 2019
- IPS II
- April 1, 2019
- IPS III
- July 8, 2019
- IPS IV

Budget Timeline 2018 - 2019
- Oct. 31: Clinical Volume Forecast Submitted
- Jan. 9: EVP/P FY19 Forecast Approval
- Jan. 22: Dept. Margins Delivered
- April 28: Dept. Budgets Due
- April 19: UT System Video Conference
- June 8: Budget & 6-Year Forecast Submitted
- Aug. 3: LAR Final Due to UT System

HR e-Performance 2018 - 2019
- Sept. 1, 2018: Evaluation Period Starts
- May 1, 2019 - Aug. 31, 2019: Monitor and track employee performance
- Oct. 31, 2019: Deadline to complete evaluations

1st Quarter
- Execute Current FY Plans
- Review prior FY EOY Results
- Refresh Situational Analysis
- Define Key Financial Assumptions

2nd Quarter
- Identify Key Planning Issues
- Draft Strategic Goals
- Draft Budgets
- Review Alignment & Interdependencies
- Refresh Situational Analysis
- Review Q1/Course Corrections

3rd Quarter
- Develop Preliminary Strategic Plan for next FY
- Finalize and submit Budgets
- Align Resources with Plan
- Refresh Situational Analysis
- Review Q2/Course Corrections

4th Quarter
- Finalize next FY Strategic Plan
- Align School/Department/Individual Plans with Institutional Goals
- Refresh Situational Analysis
- Review Q3/Course Corrections

Office of Strategic Management
8/10/2018