

## TIMELINE FOR URIC ANNUAL REPORTS PROCESS (EST. 2020)

Description of Activity	Months in Fiscal Year													Notes
	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	
Collect and compile year-end metrics and analysis														Condensed timeline possible due to standardization & efficiencies
Send year-end report & operations eval.														Include Directors in send-out; operations evaluation provided in time to correct course; eliminates need to cover more operations/administration in meeting w/ Directors; FY20 will be sent in January, future years aim for November
URICA meet with URIC lead admin.														FY20 meetings will be January/February; future years aim for November/December
Revise and issue call for reports														Focus to current fiscal year; first year provide opportunity to cover all activity since last report/meeting (e.g. if met in July and had update of significant in August); Annual Report would be during and about the given fiscal year (FY20 for first year); w/ budget request for next fiscal year (FY21)
Complete and submit reports														Tied to a May 15th submission, so that Annual Report can include the Management Budget request alongside the OR URIC Allocation request for perations
Discuss reports and answer questions														Goal to have URIC Dashboard ready and available to URICs to inform them and reference when writing reports, which would include a year-to-date proposal & awards report; would also already have year-end reports
Receive and review reports														May 15th due date, leaves some flexibility; URICA process reports and aggregate for AVPs in ~2-days
Send reports w/ metrics to AVPs														Will include year-to-date data (not just year-end) for metrics where this is possible (e.g. sponsored activity)
Review and evaluate reports														Turn around materials to AVPs quickly (1-2 days from due); provide 2-3 weeks for AVP evaluations
Annual Report Retreat														Aim for last week of May, or first week of June
Follow-up budget meeting (as needed)														Early June (only if needed)
Meetings with Directors, URIC Lead Admin, URICA, AVPs														Reports are current through mid-May (almost 3 full quarters) and meetings held within 2-3 months of submission

Key:	Ongoing	Finished
OR URICA & Leadership		
OR/URIC Leadership		
OR/URIC Admin		
OR URICA Only		