

## **SWITCH Management Calendar – Annual (rev 1/09)**

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| <b>July</b>      | Send 1 <sup>st</sup> quarter assessment invoices<br>Transfer items to SWITCH archives housed at Alverno                                                                                                                                                                                                                                                                                                                                                                |
| <b>August</b>    | LITC reviews current year of Long Range Plan<br>Send Inter-Institutional Fine Transfer invoices for previous January-June                                                                                                                                                                                                                                                                                                                                              |
| <b>September</b> | Annual Collection & Request Statistics Report to LITC<br>Annual Financial Audit                                                                                                                                                                                                                                                                                                                                                                                        |
| <b>October</b>   | Send 2 <sup>nd</sup> quarter assessment invoices<br>SWITCH Day planning for January event                                                                                                                                                                                                                                                                                                                                                                              |
| <b>November</b>  | Collect FTE figures for assessment formula for upcoming FY budget<br>Evaluate Disaster Recovery Plan                                                                                                                                                                                                                                                                                                                                                                   |
| <b>December</b>  | Submit Draft Budget to LITC for upcoming Fiscal Year<br>Compare to Long Range Plan                                                                                                                                                                                                                                                                                                                                                                                     |
| <b>January</b>   | Send 3 <sup>rd</sup> quarter assessment invoices<br>Millennium authorizations “audit” & staff directory updates on web page<br>Send copies of auditor’s report to LITC, Finance, & Board of Trustees                                                                                                                                                                                                                                                                   |
| <b>February</b>  | Evaluation of Long-Range Plan to date<br>Send Inter-Institutional Fine Transfer invoices for previous July-December                                                                                                                                                                                                                                                                                                                                                    |
| <b>March</b>     | SWITCH Day Planning for summer event<br>Self-Evaluations for performance reviews.                                                                                                                                                                                                                                                                                                                                                                                      |
| <b>April</b>     | Send 4 <sup>th</sup> quarter assessment invoices<br>IUG annual meeting & report to LITC<br>Coordinator review of other employees in SWITCH office<br>LITC completes performance reviews & prepares report for Board of Trustees<br>List of possible end-of-year purchases to LITC                                                                                                                                                                                      |
| <b>May</b>       | Forward LITC approved draft budget to Finance Committee<br>Submit draft Annual Report/Long Range plan to LITC for approval<br>Send Annual Meeting materials to Board of Trustees <ul style="list-style-type: none"><li>▪ Minutes from last annual meeting</li><li>▪ Annual Report with Long Range Plan</li><li>▪ Finance Committee presents:<ul style="list-style-type: none"><li>• Auditors Report</li><li>• Proposed budget for next fiscal year</li></ul></li></ul> |
| <b>June</b>      | Annual Board of Trustees meeting<br>Millennium authorizations “audit” & staff directory updates on web page<br>Send Salary/Benefits letter to CSU for new fiscal year                                                                                                                                                                                                                                                                                                  |