



Annual Report Due Dates

Cycle of Required Reports

REPORTING CYCLES

Annually

Performance Evaluation Report | Policy 705.2 – Self-evaluation and goals for coming year must be reported by both flagship Presidents and the Commissioner. Usually reported in the spring

Quarterly

920.1 IT Purchases Report

Biennially – Due one every other year

The commissioner shall submit a report summarizing the tuition proceeds and contractual commitments for debt repayment in regard to the Montana Rural Physicians Incentive Program pursuant to Policy 940.25

OCHE shall report on timber sale proceeds to the DNRC Trust Land Division pursuant to MCA 17-3-1003

Tri-Annually

Campus mission statements shall be reviewed by the BOR pursuant to Policy 219.

Even-Numbered Years

MUS shall report on heritage properties to the preservation review board pursuant to MCA 22-3-422 & 424

A number of reports are required by BOR Policy to be created and submitted to the OCHE office. Note that not all reports require direct reporting to the board. A list of those and when they are due follows:

Campus Reports

Each campus must submit a campus report highlighting current events and achievements from the past few months. **DUE AT ALL BOR MEETINGS**

1202.2 - Campus Athletic Report

Intercollegiate athletics shall be budgeted and funded in the same manner as any other regular program of the university system. OCHE collects data on the athletic annual income details, student athlete information, including GPA, graduation and financial aid details during November of each year and prepares a summary report that is normally available by January of each year. **DUE ANNUALLY IN JANUARY**

1003.7 - Authorization for Building Projects Report

Campuses shall report existing BOR authority for building projects pursuant to Policy 1003.7. In **even-numbered years**, each university shall report on legislative authority pursuant to Policy 1003.7 **DUE AT MAY BOR MEETINGS**

901.11 - Negative Fund Balance Report

Each campus, agency, and the Commissioner's office shall provide an update on the status of the projections in 1 above at the subsequent May BOR meeting. Campuses and the commissioner's office shall identify every occurrence of negative fund balance in the regents approved operating budget; if a fund balance deficit is chronic or material the campuses, agencies and OCHE shall provide a report to the BOR at their next November meeting pursuant to Policy 901.11. **DUE AT MAY BOR MEETINGS**

760 – Service on Outside Governing Board Report

Annual employee disclosures of service on governing or policy-making boards shall be submitted to the commissioner and the Board of Regents, pursuant to Policy 760. **DUE ANNUALLY IN JULY**

MUS Staff and Comp Guidelines Report –

This report pertains to employees covered by the MUS Staff Compensation Plan (classified staff). Each campus shall, by August 1 of each year, submit a report to the Commissioner of Higher Education which includes the names and job titles of all individuals who received Strategic Pay in the prior fiscal year and the amount, type and purpose of Strategic Pay. At the same time, each campus shall report the names, job titles and amount and purpose of all employees who received lump sum bonuses in the prior fiscal year. **DUE ANNUALLY IN AUGUST**

910.1 and MCA 17-7-138 Report-

Pursuant with Policy 910.1 and MCA 17-7-138; reporting of annual operating budgets of campuses, agencies, community colleges and OCHE must be presented before the Board for approval. **DUE AT SEPTEMBER BOR MEETINGS**

MCA 17-2-304 – Report of Expenditures related to production and distribution of public service announcements. **DUE ANNUALLY BY SEPTEMBER 15TH**

940.14 Campus Tuition Waiver Report

Pursuant with Policy 940.13 on Tuition Waivers each unit of the MUS will report to the BOR as part of the annual operating budget. **DUE AT SEPTEMBER BOR MEETINGS**

303.7 - Distance Education Report

Pursuant with Policy 303.7 on Distance Education UM and MSU annual report must be submitted detailing online learning activity over the preceding fiscal year. **DUE ANNUALLY BY SEPTEMBER 1ST**

303.3 Report - Program Review

Each campus will review all of its programs at least once every seven years. Each campus will report the results of its internal program review, for the preceding year, at the November meeting of the Montana board of regents. Those reports will focus especially on the decisions associated with the future of each program, following its review. The report submitted to the Montana board of regents shall include graduation numbers and student major numbers for each of the last seven years for every program under review. **DUE AT NOVEMBER BOR MEETINGS**

901.11 - Negative Fund Balances Report-

A Negative Funds Report from the campuses, agencies and OCHE will be made pursuant to Policy 901.11. **DUE AT NOVEMBER BOR MEETINGS**

711.1 – Employment Report

Commissioner’s annual report on MUS employment contract trends **DUE AT NOVEMBER BOR MEETINGS**

407 Employee Equity Interest Report

Each unit shall file a report with the Commissioner of all employee inventor or creator equity interests approved by the Board of Regents by December 31st of that reporting year. The annual report shall only contain changes to the previous year’s report. **DUE ANNUALLY BY DECEMBER 31ST**

770 Conflict of Interest Report

Each campus shall submit a Conflict of Interest Report pursuant to Policy 770. **DUE ANNUALLY BY DECEMBER 31ST**

401.1 Report – Consulting and Services Faculty

Annually, by December 31st, each campus should prepare an inventory of faculty consulting activities, including relevant documentation, during the preceding fiscal year. **DUE ANNUALLY BY DECEMBER 31ST**