

ANNUAL REPORTS DUE DATES

	DUE	REPORT	POLICY#	TO	OCHE STAFF	CAMPUS STAFF
1	January Meeting	Federal Initiative Report	401-D Research & Tech. Transf.	CHE and BOR	Sylvia Moore	
2	January Meeting	UM and MSU reports summarizing research and technology transfer activities for the previous fiscal year.	401-E Research & Tech. Transf.	CHE	Sylvia Moore	
3	January Meeting	Campus athletic reports	1202.2 Intercollegiate Athletics (IDA)	CHE	Mick Robinson & Frieda Houser	
4	March 15	Campus special reports detailing funds transferred to other state financial aid programs as authorized in § V-C of Policy 504.2	504.2 Work Study Program	CHE	MGSLP	
5	Every Spring	Self Evaluation and Goals for coming year (Presidents and OCHE Staff)	CHE directive	CHE/BOR	CHE	
6	May Meeting	UM and MSU shall report and update existing Board of Regents-authorized building projects.	1003.7 Authorization for Building Projects	BOR	Mick Robinson & Frieda Houser	
7	May Meeting	Campus, agency, and OCHE updates on negative fund projections identified in the operating budget.	901.11 Negative Fund Balances	BOR	Mick Robinson & Frieda Houser	
8	May Board Meeting	Operating agreements between campuses and their affiliated foundations.	901.9 Campus Affiliated Foundations	BOR	Mick Robinson & Frieda Houser	
9	May In Even-Numbered Years	UM and MSU reports and updates regarding existing legislative building authority.	1003.7 Authorization for Building Projects	BOR	Mick Robinson & Frieda Houser	
10	July 1	Campus reports of employee service on outside governing boards and related compensation.	760 Service on Outside Gov'ing Boards	CHE/BOR	CHE & Legal	
11	August 1	Campus strategic pay pay and lump sum bonus reports.	MUS Staff & Comp Guidelines	CHE	HR	

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12	August 1, 2012	Campus reports on progress toward a tenure review process.	SJ 11, 2011 Leg. Session	Educ. & Local Govt. Com.	Sylvia Moore	
13	September 15	Campus reports and information in connection with the Work Study Program	504.2 Work Study Program	CHE	MGSLP	
14	September 15	Annual report of online learning activity over the preceding fiscal year.	303.7 Distance Education	BOR ARSA Committee	Tom Gibson	
15	September 15	Report of expenditures related to production and distribution of public service announcements.	MCA 17-2-304	Legislative Finance Comm.	Mick Robinson	
16	September meeting	Annual operating budgets of campuses, agencies, community colleges and OCHE	MCA § 17-7-138; Policy 910.1 Community Colleges	BOR	Mick Robinson & Frieda Houser	
17	October 1	Foundation financial statements and list of foundation officers, directors, or trustees.	901.9 Foundations	CHE and BOR	Mick Robinson & Frieda Houser	
18	October 1	Campus reports of tuition waivers, as part of the annual operating budgets.	940.13 Tuition Waivers	BOR	Mick Robinson & Frieda Houser	
19	October 1	Campus inventory of faculty consulting activities including relevant documentation for the preceding year.	401.1 Consulting Services; Faculty	Campus	Sylvia Moore	
20	October 1	Campus reports of results of its internal program review for the preceding year.	303.3 Program Review	BOR	Sylvia Moore, HR	
21	October 15	If applicable, campus, agency & OCHE reports of chronic negative fund balances & material deficit balances & other information listed in policy.	901.11 Negative Fund Balances	BOR	Mick Robinson & Frieda Houser	
22	November meeting	Commissioner's annual report summarizing the status and trends of MUS employment contracts.	711.1 Employment	BOR	HR	
23	December 31	Reports identifying employees with equity or governing interests in research-related businesses.	407 Employee Equity Interest	CHE	Legal	

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24	December 31	Campus written conflict of interest reports including information identified in Policy 770.	770 Conflict of Interest	BOR	Legal	
25	Periodically	Campuses will monitor compliance with policy and report success in meeting timelines.	301.5.1 System of Controls	BOR	Sylvia Moore & Tyler Trevor	
26	Quarterly	Campus reports summarizing IT acquisitions without system-wide impact & an estimated cost of less than \$50,000.	920.1 IT Purchases	CHE	Mick Robinson	
27	Quarterly meetings	Campus meetings with local executive board.	MCA 20-25-304, Policy 217.1, Local Executive Boards	Campus Authority	Mick Robinson	
28	Semi-annually	Campus reports on specific implementation of policies of privacy, security and monitoring.	1302 Privacy, security and monitoring	CHE	Tyler Trevor	Academic Officers
29	Yearly, at end of coach's annual contract term	Campus compensation report for coaches on multi-year contracts.	CHE letter of 10-15-2010	CHE	HR	
30	Even-numbered years	MUS report on status of heritage properties	MCA 22-3-422 & 424	Preservation Review Board	Mick Robinson	
31	Biennially	Diversity Action Plan results	1902 Minority Achievement	CHE	Brandi Foster	
32	Biennially	CHE's report summarizing the tuition proceeds and contractual commitments for debt repayment.	940.25 Rural Physicians Incentive Program	BOR	Sylvia Moore & Laurie Tobol	
33	Biennially	BOR shall designate distribution of timber sale proceeds.	MCA 17-3-1003	DNRC Trust Land Division	Mick Robinson	
34	Every three years	Mission statements.	219 Mission Statements	CHE and BOR	Sylvia Moore	

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35	Does not specify	Report of Distiguated Service awards conferred by campuses.	322.2 Distinguished Service Awards	BOR	HR	