

Integrated Planning – Year 2 Annual Update

Fall Semester Checklist

1

Review Your Plan

Best completed in September

Login to Diamond and review your Three-Year Plan:

- Review and remind yourself of your Year 1 goals.
- Make **minor adjustments** to dates, statuses, or wording as needed.

2

Talk with Your Supervisor

Best completed in September

Discuss your plan with your supervisor, especially if you:

- **Need new budget items.**
 - Talk with your supervisor about **all new budget needs**.
 - You must get their ‘general blessing’ **before** submitting capital, equipment, or technology **cost estimate requests**.
 - **Last date to submit cost estimate requests: Friday, September 26**
- **Need new or major changes to goals.**
- **Need help from another area of the college.**
 - Talk with your supervisor if you need help from another area of the college to complete your goal (e.g. marketing, recruitment) before reaching out to them.

3

Finalize Your Year 2 Update

Anytime this fall – complete by December 1

Login to Diamond and complete your Three-Year Plan Annual Update:

- Add a Year 2 update to each goal.
- If needed, adjust goal statuses, dates, or wording.
- If needed, **add any new goals or budget requests**.

By December 1, approve each goal to route to your supervisor for review.



Need Help or Have Questions? Attend an Open Lab

- **Tuesdays, 3:00-5:00pm (September 17-October 1, 2025)**
 - Teams (email planning@otc.edu for link)
- **Fridays, 10:00-11:00am (August 29-October 3, 2025)**
 - Simmons Conference Room (Springfield Campus – ICE 224)
- **On demand and printable resources are also available at <https://about.otc.edu/iplan/annual-update>**