

Draft FY 2008-2009 Berkeley Lab Management Planning Calendar

Management Area	October	November	December	January	February	March	April	May	June	July	August	September
DOE and Institutional budgeting	FY 2007 costs close	1st quarter spend plan (current) issued		FWP preparation	2nd quarter spend plan (current) issued	DOE Field Budget submission			3rd quarter spend plan (current/next) issued	4th quarter spend plan (current/next) issued Indirect budget call	FY 2008 Indirect rate to DOE Indirect budget	Financial close
Work for Others Science Proposal Submissions	NIH New and Program Project Grants (PPG)	NIH renewals and resubmissions		CA Breast Cancer Research UC Tobacco Research	NIH New and Program Project Grants (PPG)	NIH renewals and resub-missions CIEE Environmental R&D	DOD Breast Cancer Research	UC Discovery Grant	NIH New and PPG deadline	NIH renewals and resubmissions	DOD Breast Cancer, Innovator, and Center Awards	CEC (CA Energy Commission)
Divisional Reviews		Physics Director's Review; Life Sciences Director's Review				Public Affairs Dept. Peer Review	Physical Biosciences; Nuclear Science Director's Reviews	Accelerator & Fusion Research; Computing Director's Reviews	Environmental Energy Technologies Director's Review			
Environment, Health & Safety	Safety Scorecard review EHS Self Assessment	Call for ISM updates	ISM Updates due Dir/OPS Safety Committee Mtg.			Dir/OPS Safety Committee Mtg.	Annual disaster preparedness drill ISM Integrated Corrective Action Plan		JHQ update; complete outstanding training; Dir/OPS Safety Committee Mtg.			Dir/OPS Safety Committee Mtg.
		Note: Management Walkarounds throughout the year										
Institutional Assurance	2007 C98-31 Self Assessment submission			C -31 1st quarter Performance Evaluation Review			C -31 2nd quarter Performance Evaluation Review			C -31 3rd quarter Performance Evaluation Review	C-31 Final Performance Evaluation Review underway	Final 2009 Performance Evaluation Measurement Plan (PEMP)
SC/DOE On Site Review/ Business Planning/WFO Plan	DOE Business Plan guidance	Directors' Retreat	Advisory Board	DOE Business Plan finalized			WFO Plan Draft	Advisory Board WFO Plan issued				Directors' Retreat
LDRD Program	FY 2008 Project starts FY 2007 DOE CFO database		Call for FY 2009 LDRD Proposals FY 2007 Annual Reports		FY 2007 LDRD Annual Report to DOE	FY 2009 LDRD Proposals due to DD	FY 2009 LDRD rankings due Directorate	LDRD Proposal reviews	FY 2009 LDRD selections announced		FY 2009 LDRD datasheets due DOE	FY 2009 Project setups

			from PIs									
<u>Facilities/ Infrastructure</u>	Approved FY Projects implemented – Maint., Def. Maint., Non-Cap, GPP & GPE 2,5&10 Year Strategies Updated	2,5&10 Year Strategies Updated	Begin preparation of FY+2 budget submittals and Ten Year Site Plan		Identify top 2 priorities for SLI line items	IFI Crosscut Budget Submittal; Construction Project Datasheet submission; FWP FY+2 SLI LIP, GPP& GPE	“Unified” Call to Divisions and ALDs for GPP, GPE, Non-Cap, Maint. & Def. Maint. priorities	DDs identify needs, without regard to color of money	Ten-Year Site Plan submitted to DOE HQ (via BSO) (tentative) ALDs work with DDs to prioritize “Call” needs	Priority candidates reviewed for color of money, estimated cost, ES&H issues & Maint./DMR Plan consistency	Leadership reviews of “Unified” Call priorities – Maint., Def. Maint., GPP, Non-Cap & GPE.	Leadership Approves FY+1 Maint., Def. Maint., GPP and Non-Cap lists Engineering & Procurement Packages started for FY+1 projects
<u>Human Resources/</u>	Salaries Finalized							PRD roll-out	Compensation Increase Plan (CIP) reviewed; submitted to DOE on 6/30	PRD Review	Final PRD due	Salaries FY+1 reviewed
<u>Workforce Diversity</u>				Workforce Climate Survey data released		Climate Survey Brown-bags	Division’s Diversity Plans Assessment/ Update		Division’s Diversity Plans Approval			
<u>Tech Transfer</u>					Royalty Distribution Ceremony	R&D 100 Award Proposals due				C-31 Evaluation Measurement Plan Call		Nominations for R&D 100 awards

**Color Coding -- Call issued/Begin process -- Senior Management Review --
DDM/DAC Agenda Item -- Final decision/Submission**

Acronyms

ALDs	Associate Laboratory Directors
C-31	Contract 31 for Operation of Lawrence Berkeley National Laboratory
DD	Division Directors
DOD	Department of Defense
DOE	Department of Energy
ESH	Environment < Health & Safety
FWP	Field Work Proposal
FY	Fiscal Year
GPE	General Purpose Equipment
GPP	General Plant Projects
IFI	Integrated Facilities Infrastructure
ISM	Integrated Safety Management
LDRD	Laboratory Directed Research and Development
NIH	National Institutes of Health
Non-Cap	Non Capital
PBD	Physical Biosciences Division
PPG	Program Project Grants
PRD	Performance Review and Development
R&D	Research & Development
SLI	Science Laboratory Infrastructure
UC	University of California