



# INDIANA UNIVERSITY

## UNIVERSITY BUDGET OFFICE

### 2019-20 Operating Budget

### DRAFT - Budget Calendar

#### Due date

Sept. 24, 2018	Send to campuses – post to website <ul style="list-style-type: none"><li>DRAFT Budget Construction processing schedule</li></ul>
Oct. 1, 2018	Open Fee Portal/Non-Instructional Fee Request Application (due Nov. 30)
Oct. 4-5, 2018	Trustee meeting - IUPUI
Oct. 29, 2018	Request from Andrea - University Institutional Research & Reporting: <ul style="list-style-type: none"><li>Fall Enrollment Study</li></ul>
November 30, 2018	Close Fee Portal
Dec. 6-7, 2018	Trustee meeting – IU Kokomo
Dec. 7, 2018	Receive from Andrea - University Institutional Research & Reporting: <ul style="list-style-type: none"><li>Fall Enrollment Study</li></ul>
Dec. 10, 2018	Request from Risk Management <ul style="list-style-type: none"><li>Fire and casualty insurance usage and cost rates (due March 1, 2019)</li></ul> Request from campuses: <ul style="list-style-type: none"><li>Identification of all base transfers anticipating any reorganization or reallocation plans (due Jan. 14, 2019)</li></ul> Send to VPCFO: <ul style="list-style-type: none"><li>Non-instructional fee rate requests</li></ul>
December 17, 2018	Send to campuses: <ul style="list-style-type: none"><li>Non-instructional fee rate request approvals/disapprovals/changes</li><li>Energy and Utilities Actuals for budget planning</li></ul>
Jan. 14, 2019	Receive from campuses: <ul style="list-style-type: none"><li>Identification of all base transfers anticipating any reorganization or reallocation plans</li></ul> Request from Investment and Debt Management: <ul style="list-style-type: none"><li>Debt service obligations (due Mar. 1, 2019)</li></ul> Five Year Projection Model distributed to the campuses



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Jan. 21, 2019	<b>Send to campuses:</b> <ul style="list-style-type: none"><li>• Distribution of updated regional allocation spreadsheets</li></ul>
Jan 31 – Feb 1, 2019	<b>Trustee Meeting – IUPUI</b>
February 4, 2019	<b>Publish to Web/Open for access</b> <ul style="list-style-type: none"><li>• 2018-19 non-instructional fee income and other incidental income (INC INC) estimates (close Application March 29)</li><li>• Credit Hour Application available (close March 29)</li></ul>
March 1, 2019	<b>Receive from Risk Management:</b> <ul style="list-style-type: none"><li>• 2019-20 Fire and casualty insurance rates</li></ul> <b>Receive from Investment and Debt Management:</b> <ul style="list-style-type: none"><li>• Debt service obligations</li></ul>
March 4, 2019	<b>Request from campuses:</b> <ul style="list-style-type: none"><li>• Must-do items (due Mar. 29, 2019)</li></ul> <b>Send to campuses:</b> <ul style="list-style-type: none"><li>• Fire and Casualty Insurance usage and costs estimates</li></ul>
March 8, 2019	<b>Receive from Campus</b> <ul style="list-style-type: none"><li>• Five Year Projection Model</li></ul>
Mar. 11, 2019	<b>Budget construction environment and tables created (“Genesis”)</b> <b>Org and account changes to Alicia for BC Updates</b> <b>2019-20 benefit rates</b>  <b>Request from Office of Research Administration:</b> <ul style="list-style-type: none"><li>• Contracts &amp; Grants expenditure projections (due April 5th)</li></ul>
Mar. 15, 2019	<b>Open Fee Portal for Graduate, Professional, Distance Education and other</b> <b>Mandatory Fee request and justifications</b>
Mar. 25, 2019	<b>Send to campuses:</b> <ul style="list-style-type: none"><li>• Draft Salary Policy Assumptions</li><li>• UA Tax Assumptions</li></ul>



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Mar. 29, 2019	Receive from campuses: <ul style="list-style-type: none"><li>• Must-do items</li><li>• 2019-20 credit hour enrollment estimates –Close application</li><li>• INC INC – Close Application</li></ul>
April 4-5, 2019	Trustee meeting – Bloomington
April 5, 2019	Receive from Office of Research Administration: <ul style="list-style-type: none"><li>• Contracts &amp; Grants expenditure projections</li><li>• Send Campus Revenue Projections – V.C</li></ul> Distribute University Fiscal Analysis Template (due April 30 <sup>th</sup> )  Campuses Submit: <ul style="list-style-type: none"><li>• Close Fee Request Portal for Graduate, Professional, Distance Education and Other mandatory fee rate requests and justifications</li></ul>
April 8, 2019	ADMINISTRATIVE FREEZE OF BASE BUDGET (other than adjustments within responsibility centers) – campus may freeze earlier Populate benefit rates/reason codes Load INC INC
April 11, 2019	System freeze base budget for detailed budget construction (base column of BA is grayed out)  Budget pushed down to chart level/Detailed budget construction available
April 29, 2019	State Session ends
May 11-15, 2019	Receive ICHE Non-binding recommendation on resident undergrad tuition and fee rates
May 13, 2019	Preliminary Revenue Projections
May 17, 2019	Send to Campuses: Official Salary Policy and supplemental spreadsheet Tuition Rates University Tax Guideline University Administration Targets (UA Units) Post tuition rates
Week of May 27, 2019	Campus Review of Budgets – Regional/UA Budgets at IU-UNIV Begin Budget Presentation materials for BOT meeting



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May 29, 2019	Test payroll/BCAF load extract Union negotiations completed
May 30, 2019	Test Union Export
May 31, 2019	Budgets at the Campus level <ul style="list-style-type: none"><li>• Budget Narratives due</li><li>• University Fiscal Analysis – Originally Date April 30</li></ul>
June 3, 2019	Detailed budget construction ends; no changes to be made without UBO approval. Could potentially change what has already been presented to the trustees. <ul style="list-style-type: none"><li>• Budgets pulled to IU-UNIV level – Snapshot taken</li><li>• No level changes</li></ul>
TBD	Trustee meeting – Tuition Forum, IU Bloomington Public fee hearing Finalize Budget Presentation materials for BOT Meeting
June 4, 2019	Union Export - Union Import, rebalancing
June 13, 2019	Flip flags off – BSSYNC, CSFUPDT, PSSYNC, BCUPDT into view-only mode
June 13-14, 2019	Trustee meeting – IU Fort Wayne Approval of 2019-20 Operating Budget
June 14, 2019	Budget and salary loads
Week of June 17, 2019	Salary letters and departmental workpapers available
June 17, 2019	Budget pushed down to Campus level
June 18, 2019	July 1 Archive
July 12, 2019	Web salary list available (allow time for letters to arrive)



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#### Spring Break:

Bloomington (BL)	March 11-15	Kokomo (KO)	March 11-15
Columbus (IUPUC)	March 11-15	Northwest (NW)	March 11-15
East (EA)	March 11-15	South Bend (SB)	March 11-15
Fort Wayne (FW)	March	Southeast (SE)	March 25-31
IUPUI (IN)	March 11-15		

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