

Indiana University
2017-18 Operating Budget

Budget Calendar

Due date

Sept. 26, 2016	Send to campuses – post to website <ul style="list-style-type: none">• DRAFT Budget Construction processing schedule
Oct. 3, 2016	Send to campuses: <ul style="list-style-type: none">• Fall Fiscal Analysis template (due Oct. 31) Request from University Institutional Research & Reporting: <ul style="list-style-type: none">• Fall enrollment study
Oct. 6-7, 2016	Trustee meeting - IUPUC
Oct. 31, 2016	Receive from campuses: <ul style="list-style-type: none">• Fall Fiscal Analysis
Nov. 7, 2016	Receive from University Institutional Research & Reporting: <ul style="list-style-type: none">• Fall enrollment study
Nov. 11, 2016	Fall Fiscal Analysis Report
Nov. 21, 2016	Request from campuses: <ul style="list-style-type: none">• Non-instructional fee rate requests (due January 20, 2017)
Dec. 1-2, 2016	Trustee meeting – IU East
Dec. 5, 2016	Request from Risk Management <ul style="list-style-type: none">• Fire and casualty insurance usage and cost rates (due Feb. 6, 2017) Request from campuses: <ul style="list-style-type: none">• Identification of all base transfers anticipating any reorganization or reallocation plans (due Jan. 6, 2017)
Jan. 6, 2017	Request from Investment and Debt Management: <ul style="list-style-type: none">• Debt service obligations (due Mar. 10, 2017) Receive from campuses: <ul style="list-style-type: none">• Identification of all base transfers anticipating any reorganization or reallocation plans• Known organizational changes in place for fiscal year 2018.• Distribution of regional allocation spreadsheets
Jan. 20, 2017	Receive from campuses: <ul style="list-style-type: none">• Non-instructional fee rate requests
Jan. 27, 2017	Send to VPCFO: <ul style="list-style-type: none">• Non-instructional fee rate requests

Indiana University
2017-18 Operating Budget

Budget Calendar

- Jan. 30, 2017** **Send to campuses:**
- Publish INC INC Application to the Web/Open for access
 - 2017-18 non-instructional fee income and other incidental income (INC INC) estimates (close Application week of March 24)
 - Energy and Utilities Actuals for budget planning
- Feb. 2-3, 2017** **Trustee Meeting – IUPUI**
- Feb. 6, 2017** **Request from campuses:**
- Must-do items (due Mar. 3, 2017)
 - Student activity fee distribution rates (Student Government Association (SGA) input – after-the-fact schedule)
- Receive from Risk Management:**
- 2017-18 Fire and casualty insurance rates
- Send to campuses:**
- Non-instructional fee rate request approvals/disapprovals/changes
 - Spring fiscal analysis template (due Mar. 10, 2017)
 - Final Adjustments to Regional income attribution and indirect cost allocation parameters
 - Spring Enrollment Study (IU Tuition Revenue Model)
 - Fire and Casualty Insurance usage and costs estimates
- Mar. 3, 2017** **Publish to Web/Open for access**
- 2017-18 credit hour enrollment estimates (due March 24)
 - Provide UIRR Enrollment Data
- Receive from campuses:**
- Must-do items
- Mar. 6, 2017** **Budget construction environment and tables created (“Genesis”)**
- Once BC environment is created notify Bill Overman to route org and account changes to Alicia for BC Updates**
- Finalize benefit rates**
- Request from Office of Research Administration:**
- Contracts & Grants expenditure projections (due April 7)
- Mar. 10, 2017** **Receive from campuses:**
- Spring fiscal analysis
- Receive from Investment and Debt Management:**
- Debt service obligations

Indiana University
2017-18 Operating Budget

Budget Calendar

Mar. 13, 2017	Send to campuses: <ul style="list-style-type: none">• 2017-18 benefit rates
Mar. 24, 2017	Receive from campuses: <ul style="list-style-type: none">• INC INC – close application (extended April 14)
Mar. 29, 2017	Receive from campuses: <ul style="list-style-type: none">• 2017-18 credit hour enrollment estimates (extended April 14)
April 7, 2017	Receive from Office of Research Administration: <ul style="list-style-type: none">• Contracts & Grants expenditure projections• Send Campus Revenue Projections – V.C (extended April 17)
April 10, 2017	ADMINISTRATIVE FREEZE OF BASE BUDGET (other than adjustments within responsibility centers) – campus may freeze earlier Populate benefit rates/reason codes Load INC INC (extended April 17)
April 13-14, 2017	Trustee meeting – Bloomington
April 17, 2017	System freeze base budget for detailed budget construction (base column of BA is grayed out) Distribute Fee Rate Request Template: <ul style="list-style-type: none">• Graduate, professional, distance education and other mandatory fee request and justifications Budget pushed down to chart level/Detailed budget construction available
April 28, 2017	Campuses Submit Fee Rate Request: <ul style="list-style-type: none">• Graduate, professional, distance education and other mandatory fee rates requests and justifications State Session ends
May 11, 2017	Receive ICHE Non-binding recommendation on resident undergrad tuition and fee rates
May 16, 2017	Send to Campuses: Salary Policy and supplemental spreadsheet Tuition Rates
May 17, 2017	Send to Campuses: University Tax Guideline Revenue projection/valuation reports - V1 Report (Constant effective rates escalated by RECOMMENDED fee rate percentage changes)
May 19, 2017	University Administration Targets

Indiana University
2017-18 Operating Budget

Budget Calendar

May 22, 2017	Begin Budget Presentation materials for BOT meeting
May 24, 2017	Post tuition rates
May 31, 2017	Budgets at the Campus level – Regional/UA budgets at IU-UNIV Union negotiations completed
Week of May 29, 2017	Campus Review of budgets
May 31, 2017	Test payroll/BCAF load extract
June 2, 2017	Detailed budget construction ends; no changes to be made without UBO approval because of the implication of changing what has potentially already been presented to the trustees.
	Budgets pulled to IU-UNIV level Budget Narratives due
June 5, 2017	Test Union Export
June 7, 2017	Trustee meeting – Tuition Forum, IU Bloomington Public fee hearing Finalize Budget Presentation materials for BOT Meeting Union Export - Union Import, rebalancing
June 15-16, 2017	Trustee meeting – IU South Bend Approval of 2017-18 operating budget
June 15, 2017	Flip flags off – BSSYNC, CSFUPDT, PSSYNC, BCUPDT into view-only mode
June 16, 2017	Budget and salary loads
Week of June 19, 2017	Salary letters and departmental workpapers available
June 19, 2017	Budget pushed down to Campus level
June 20, 2017	July 1 Archive
July 14, 2017	Web salary list available (allow time for letters to arrive)
August 7, 2017	Post Official Budget

Spring Break:

Bloomington (BL)	March 13-20	Kokomo (KO)	March 13-20
Columbus (IUPUC)	March 13-20	Northwest (NW)	March 13-20
East (EA)	March 13-20	South Bend (SB)	March 13-20
Fort Wayne (FW)	March 06-13	Southeast (SE)	March 27-April 3
IUPUI (IN)	March 13-20		