



2020-21 Draft Operating Budget Calendar

Due date

Sept. 23, 2019	Send to campuses – post to website <ul style="list-style-type: none">DRAFT Budget Construction processing schedule
Oct 3-4, 2019	Trustee meeting – IUPUI
Oct 24, 2019	Send to campuses 5 Year Budget Model
Oct. 28, 2019	Request from Andrea - University Institutional Research & Reporting: <ul style="list-style-type: none">Fall Enrollment Study
Nov. 4, 2019	Request from Campuses Budget Reallocation and New Revenue Summary
Dec. 5-6, 2019	Trustee meeting – IU East
Dec. 9, 2019	Request from Risk Management <ul style="list-style-type: none">Fire and casualty insurance usage and cost rates (due April 6, 2020) <p>Request from campuses:</p> <ul style="list-style-type: none">Identification of all base transfers anticipating any reorganization or reallocation plans (due Jan. 17, 2020)
Dec. 10, 2019	Receive from Campuses 5 Year Budget Model
Dec. 13, 2019	Receive from Campuses Budget Reallocation and New Revenue Summary
	Request from Investment and Debt Management: <ul style="list-style-type: none">Debt service obligations (due Mar. 20, 2020)
	Receive from Andrea - University Institutional Research & Reporting: <ul style="list-style-type: none">Fall Enrollment Study
Jan. 17, 2020	Receive from campuses: <ul style="list-style-type: none">Identification of all base transfers anticipating any reorganization or reallocation plans
Feb. 3, 2020	Publish to Web/Open for access <ul style="list-style-type: none">2019-20 non-instructional fee income and other incidental income (INC INC) REVIEW – ONLY EXCEPTIONS TO BE UPDATED (close Application April 6, 2020)Credit Hour Projector available (due April 6, 2020)



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Feb. 3, 2020	Send to campuses: <ul style="list-style-type: none">• Energy and Utilities Actuals for budget planning
Feb. 13-14, 2020	Trustee Meeting – IUPUI
Feb. 21, 2020	Send to campuses: <ul style="list-style-type: none">• Salary Policy and Benefit Rates
Mar. 20, 2020	Receive from Investment and Debt Management: <ul style="list-style-type: none">• Debt service obligations
Mar. 23, 2020	Request from Office of Research Administration: <ul style="list-style-type: none">• Contracts & Grants expenditure projections (due April 24th) Budget construction environment and tables created (“Genesis”) Org and account changes to Alicia for BC Updates
April 6, 2020	ADMINISTRATIVE FREEZE OF BASE BUDGET (other than adjustments within responsibility centers) – campus may freeze earlier
April 9-10, 2020	Trustee meeting – IU South Bend
April 10, 2020	Receive from campuses: <ul style="list-style-type: none">• 2020-21 Close Credit Hour Projector• EXCEPTION INC INC w/updates– close application Receive from Risk Management: <ul style="list-style-type: none">• 2020-21 Fire and casualty insurance rates
April 10, 2020	System freeze - base budget for detailed budget construction (base column of BA is grayed out)
April 11, 2020	Any Outstanding Budget Adjustments will be cancelled
April 13, 2020	Budget construction environment and tables created (“Genesis”)
April 14, 2020	Populate Benefit Rates/Reason Codes CSF – Adjusted Base Copy to Request through Batch process <ul style="list-style-type: none">• Load INC INC
April 15, 2020	Budget pushed down to chart level/Detailed budget construction available



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April 24, 2020	Receive from Office of Research Administration: <ul style="list-style-type: none">• Contracts & Grants expenditure projections
May 8, 2020	Send to campuses: <ul style="list-style-type: none">• Guidelines• University Administration Targets (UA Units)• Fire and Casualty Insurance usage and costs estimates
May 15, 2020	UA Budget Reduction summaries due to UBO
June 10, 2020	Regional Campus/UA Budgets pulled to IU-UNIV
June 11-12, 2020	Trustee meeting – IU Bloomington
June 12, 2020	Test Union Export/Import
June 14-15, 2020	STG Refresh
June 15, 2020	Test payroll/BCAF load extract
June 17, 2020	BL and IN Budgets at IU-UNIV Union Export – Union Import, rebalancing
June 22 – 25, 2020	Detailed Budget Construction ends; no changes without UBO approval <ul style="list-style-type: none">• Budgets pulled to IU-UNIV level – Snapshot taken• No level changes
June 25, 2020	Flip flags off – BSSYNC, CSFUPDT, PSSYNC, BCUPDT into view-only mode, Salary Load in Audit Mode
June 26, 2020	Budget and salary loads, Update Mode
June 29, 2020	Budget pushed down to Campus level
Week of June 29, 2020	Departmental workpapers available
June 30, 2020	Send to Campuses: University Fiscal Analysis Template (Due July 17, 2020) Campus Budget Narratives Due
June 30, 2020	July 1 Archive
August 13-14, 2020	Trustee meeting –Budget Presentation, IU Bloomington



INDIANA UNIVERSITY

UNIVERSITY BUDGET OFFICE

2020-21 Draft Operating Budget Calendar

Spring Break:

Bloomington (BL)

March 15-22

Kokomo (KO)

March 15-22

East (EA)

March 15-22

Northwest (NW)

March 15-22

IUPUI (IN)

March 15-22

South Bend (SB)

March 15-22

Southeast (SE)

March 15-22

DRAFT