



# INDIANA UNIVERSITY

UNIVERSITY BUDGET OFFICE

## 2021-22 Draft Operating Budget Calendar

### Due date

Sept. 28, 2020	Send to campuses – post to website <ul style="list-style-type: none"><li>• DRAFT Budget Construction processing schedule</li></ul>
Oct 1-2, 2020	Trustee meeting – Virtual
Oct. 26, 2020	Request from University Institutional Research & Reporting: <ul style="list-style-type: none"><li>• Fall Enrollment Study</li></ul>
Nov 2, 2020	Open Fee Portal/Non-Instructional Fee Request Application (due Dec. 7)
Dec. 3-4, 2020	Trustee meeting – Virtual
Dec. 7, 2020	Close Fee Portal (open centrally until March) Request from campuses: <ul style="list-style-type: none"><li>• Identification of base transfers, anticipating reorgs (due Jan. 15, 2021)</li></ul> Request from Risk Management <ul style="list-style-type: none"><li>• Fire and casualty insurance usage and cost rates (due April 9, 2021)</li></ul>
Dec. 14, 2020	Request from Investment and Debt Management: <ul style="list-style-type: none"><li>• Debt service obligations (due Mar. 19, 2021)</li></ul> Receive from University Institutional Research & Reporting: <ul style="list-style-type: none"><li>• Fall Enrollment Study</li></ul>
Jan. 15, 2021	Receive from campuses: <ul style="list-style-type: none"><li>• Identification of all base transfers anticipating any reorganization or reallocation plans</li></ul>
Jan. 25, 2021	Send Campuses 5-year Budget Model (due March 15-Regional Campuses and UA March 22-BL, IN, IUSOM) Request Budget Reduction/Reallocation Summary Updates (Due March 15)
Feb. 1, 2021	Begin President’s Budget Conferences - end April 9th
Feb. 4-5, 2021	Trustee Meeting – IUPUI
Feb. 5, 2021	Publish to Web/Open for access: <ul style="list-style-type: none"><li>• 2021-22 non-instructional fee income and other incidental (close Application April 9, 2021)</li><li>• Grad/Prof/DE/Mandatory fees</li><li>• Credit Hour Projector available (due April 9, 2021)</li></ul>



# INDIANA UNIVERSITY

## UNIVERSITY BUDGET OFFICE

### 2021-22 Draft Operating Budget Calendar

<b>Feb. 8, 2021</b>	<b>Send to campuses:</b> <ul style="list-style-type: none"><li>• Energy and Utilities Actuals for budget planning</li></ul>
<b>Mar. 5, 2021</b>	<b>Receive from campuses:</b> Course and Admin Fees request
<b>Mar. 15, 2021</b>	<b>Receive from campuses:</b> <ul style="list-style-type: none"><li>• Budget Reduction/Reallocation Summary Updates</li><li>• 5 year Budget Model &amp; Narratives – Regional Campuses and UA units</li></ul>
<b>Mar. 19, 2021</b>	<b>Receive from Investment and Debt Management:</b> <ul style="list-style-type: none"><li>• Debt service obligations</li></ul>
<b>Mar. 22, 2021</b>	<b>Receive from campuses:</b> <ul style="list-style-type: none"><li>• 5 year Budget Model &amp; Narratives – BL, IN, IUSOM</li></ul>
<b>Mar. 23, 2021</b>	<b>Request from Office of Research Administration:</b> <ul style="list-style-type: none"><li>• Contracts &amp; Grants expenditure projections (due April 23<sup>rd</sup>)</li></ul> Budget construction environment and tables created (“Genesis”) Org and account changes to Alicia for BC Updates
<b>April 7, 2021</b>	<b>ADMINISTRATIVE FREEZE OF BASE BUDGET (other than adjustments within responsibility centers) – campus may freeze earlier</b>
<b>April 8-9, 2021</b>	<b>Trustee meeting – IU Northwest</b>
<b>April 9, 2021</b>	<b>Campuses Submit:</b> <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><li>• Close Credit Hour Projector</li><li>• Close INC INC application</li></ul> <b>Distribute University Fiscal Analysis</b>  <b>Receive from Risk Management:</b> <ul style="list-style-type: none"><li>• 2021-22 Fire and casualty insurance rates</li></ul>
<b>April 12, 2021</b>	<b>System freeze - base budget for detailed budget construction (base column of BA is grayed out)</b> <ul style="list-style-type: none"><li>• Any Outstanding Budget Adjustments will be cancelled</li><li>• Populate Benefit Rates/Reason Codes</li></ul>
<b>April 13, 2021</b>	<b>Budget pushed down to chart level/Detailed budget construction available</b>
<b>April 23 2021</b>	<b>Receive from Office of Research Administration:</b> <ul style="list-style-type: none"><li>• Contracts &amp; Grants expenditure projections</li></ul>



# INDIANA UNIVERSITY

## UNIVERSITY BUDGET OFFICE

### 2021-22 Draft Operating Budget Calendar

<b>April 29, 2021</b>	<b>State Session ends</b>
<b>May, 2021</b>	<b>Receive ICHE Non-binding recommendation on resident undergrad tuition and fee rates</b>
<b>May 17, 2021</b>	<b>Send to campuses:</b> <ul style="list-style-type: none"><li>• <b>Guidelines – Official Salary Policy</b></li><li>• <b>Tuition Rates</b></li><li>• <b>University Tax Guideline</b></li><li>• <b>University Administration Targets (UA Units)</b></li><li>• <b>Post tuition rates</b></li></ul>
<b>May 21, 2021</b>	<b>Trustee meeting – Tuition Forum, IU Bloomington Public fee hearing</b>
<b>May 26, 2021</b>	<b>Regional Campus/UA Budgets pulled to IU-UNIV Campus Review of Budgets</b> <ul style="list-style-type: none"><li>• <b>Budget Narratives due</b></li><li>• <b>University Fiscal Analysis due</b></li><li>• <b>Union negotiations complete</b></li></ul>
<b>June 1, 2021</b>	<b>Detailed Budget Construction ends; no changes without UBO approval</b> <ul style="list-style-type: none"><li>• <b>Budgets pulled to IU-UNIV level – Snapshot taken</b></li><li>• <b>No level changes</b></li></ul>
<b>June 2, 2021</b>	<b>Test Union Export/Import</b>
<b>June 4, 2021</b>	<b>Pre-Test Payroll Load (edit check cleanup)</b>
<b>June 7, 2021</b>	<b>KFS/People Soft STG Refresh (early morning) Test payroll (6pm)</b>
<b>June 9, 2021</b>	<b>Production Union Export/Import</b>
<b>June 9-11, 2021</b>	<b>Production Union Rebalancing</b>
<b>June 10-11, 2021</b>	<b>Trustee meeting – IU Bloomington</b>
<b>June 17, 2021</b>	<b>Flip flags off – BSSYNC, CSFUPDT, PSSYNC, BCUPDT into view-only mode, Salary Load in Audit Mode</b>
<b>June 18, 2021</b>	<b>Budget and salary loads, Update Mode</b>
<b>June 21, 2021</b>	<b>Budget pushed down to Campus level</b>



# INDIANA UNIVERSITY

UNIVERSITY BUDGET OFFICE

2021-22 Draft Operating Budget Calendar

**Week of June 21, 2021** Departmental work papers available

**June 21, 2021**

**July 1 Archive**

DRAFT