



2021-22 Draft Operating Budget Calendar

Due date

Sept. 28, 2020	Send to campuses – post to website <ul style="list-style-type: none">DRAFT Budget Construction processing schedule
Oct 1-2, 2020	Trustee meeting – Virtual
Oct. 26, 2020	Request from University Institutional Research & Reporting: <ul style="list-style-type: none">Fall Enrollment Study
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">Identification of base transfers, anticipating reorgs (due Jan. 15, 2021) Request from Risk Management <ul style="list-style-type: none">Fire and casualty insurance usage and cost rates (due April 9, 2021)
Dec. 14, 2020	Request from Investment and Debt Management: <ul style="list-style-type: none">Debt service obligations (due Mar. 19, 2021) Receive from University Institutional Research & Reporting: <ul style="list-style-type: none">Fall Enrollment Study
Jan. 15, 2021	Receive from campuses: <ul style="list-style-type: none">Identification of all base transfers anticipating any reorganization or reallocation plans
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">2021-22 non-instructional fee income and other incidental (close Application April 9, 2021)Grad/Prof/DE/Mandatory feesCredit Hour Projector available (due April 9, 2021)



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



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April 29, 2021	State Session ends
May, 2021	Receive ICHE Non-binding recommendation on resident undergrad tuition and fee rates
May 17, 2021	Send to campuses: <ul style="list-style-type: none">• Guidelines – Official Salary Policy• Tuition Rates• University Tax Guideline• University Administration Targets (UA Units)• Post tuition rates
May 21, 2021	Trustee meeting – Tuition Forum, IU Bloomington Public fee hearing
May 26, 2021	Regional Campus/UA Budgets pulled to IU-UNIV Campus Review of Budgets <ul style="list-style-type: none">• Budget Narratives due• University Fiscal Analysis due• Union negotiations complete
June 1, 2021	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 2, 2021	Test Union Export/Import
June 4, 2021	Pre-Test Payroll Load (edit check cleanup)
June 7, 2021	KFS/People Soft STG Refresh (early morning) Test payroll (6pm)
June 9, 2021	Production Union Export/Import
June 9-11, 2021	Production Union Rebalancing
June 10-11, 2021	Trustee meeting – IU Bloomington
June 17, 2021	Flip flags off – BSSYNC, CSFUPDT, PSSYNC, BCUPDT into view-only mode, Salary Load in Audit Mode
June 18, 2021	Budget and salary loads, Update Mode
June 21, 2021	Budget pushed down to Campus level



INDIANA UNIVERSITY

UNIVERSITY BUDGET OFFICE

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Week of June 21, 2021 Departmental work papers available

June 21, 2021

July 1 Archive

DRAFT