Due date

Sept. 23, 2019  Send to campuses – post to website
•  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:
•  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
•  Fire and casualty insurance usage and cost rates (due April 6, 2020)

Request from campuses:
•  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:
•  Debt service obligations (due Mar. 20, 2020)

Receive from Andrea - University Institutional Research & Reporting:
•  Fall Enrollment Study

Jan. 17, 2020  Receive from campuses:
•  Identification of all base transfers anticipating any reorganization or reallocation plans

Feb. 3, 2020  Publish to Web/Open for access
•  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)
Feb. 3, 2020  Send to campuses:
• Energy and Utilities Actuals for budget planning

Feb. 13-14, 2020  Trustee Meeting – IUPUI

Feb. 21, 2020  Send to campuses:
• Salary Policy and Benefit Rates

Mar. 20, 2020  Receive from Investment and Debt Management:
• Debt service obligations

Mar. 23, 2020  Request from Office of Research Administration:
• 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:
• 2020-21 Close Credit Hour Projector
• EXCEPTION INC INC w/updates – close application

Receive from Risk Management:
• 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
• Load INC INC

April 15, 2020  Budget pushed down to chart level/Detailed budget construction available
April 24, 2020  Receive from Office of Research Administration:
   • Contracts & Grants expenditure projections

May 8, 2020  Send to campuses:
   • 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
   • 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
### 2020-21 Draft Operating Budget Calendar

#### Spring Break:
- Bloomington (BL) March 15-22
- East (EA) March 15-22
- IUPUI (IN) March 15-22
- Southeast (SE) March 15-22
- Kokomo (KO) March 15-22
- Northwest (NW) March 15-22
- South Bend (SB) March 15-22