### 2021-22 Draft Operating Budget Calendar

<table>
<thead>
<tr>
<th>Due date</th>
<th>Event</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sept. 28, 2020</td>
<td>Send to campuses – post to website</td>
</tr>
<tr>
<td></td>
<td>• DRAFT Budget Construction processing schedule</td>
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<tr>
<td>Oct 1-2, 2020</td>
<td>Trustee meeting – Virtual</td>
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<tr>
<td>Oct. 26, 2020</td>
<td>Request from University Institutional Research &amp; Reporting:</td>
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<tr>
<td></td>
<td>• Fall Enrollment Study</td>
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<tr>
<td>Nov 2, 2020</td>
<td>Open Fee Portal/Non-Instructional Fee Request Application (due Dec. 7)</td>
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<tr>
<td>Dec. 3-4, 2020</td>
<td>Trustee meeting – Virtual</td>
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<td>Dec. 7, 2020</td>
<td>Close Fee Portal (open centrally until March)</td>
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<td>Request from campuses:</td>
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<td>• Identification of base transfers, anticipating reorgs (due Jan. 15, 2021)</td>
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<tr>
<td></td>
<td>Request from Risk Management</td>
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<td>• Fire and casualty insurance usage and cost rates (due April 9, 2021)</td>
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<tr>
<td>Dec. 14, 2020</td>
<td>Request from Investment and Debt Management:</td>
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<tr>
<td></td>
<td>• Debt service obligations (due Mar. 19, 2021)</td>
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<td></td>
<td>Receive from University Institutional Research &amp; Reporting:</td>
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<tr>
<td></td>
<td>• Fall Enrollment Study</td>
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<tr>
<td>Jan. 15, 2021</td>
<td>Receive from campuses:</td>
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<td>• Identification of all base transfers anticipating any reorganization or reallocation plans</td>
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<tr>
<td>Jan. 25, 2021</td>
<td>Send Campuses 5-year Budget Model (due March 15-Regional Campuses and UA March 22-BL, IN, IUSOM)</td>
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<td></td>
<td>Request Budget Reduction/Reallocation Summary Updates (Due March 15)</td>
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<tr>
<td>Feb. 1, 2021</td>
<td>Begin President’s Budget Conferences - end April 9th</td>
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<tr>
<td>Feb. 4-5, 2021</td>
<td>Trustee Meeting – IUPUI</td>
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<tr>
<td>Feb. 5, 2021</td>
<td>Publish to Web/Open for access:</td>
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<tr>
<td></td>
<td>• 2021-22 non-instructional fee income and other incidental (close Application April 9, 2021)</td>
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<tr>
<td></td>
<td>• Grad/Prof/DE/Mandatory fees</td>
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<tr>
<td></td>
<td>• Credit Hour Projector available (due April 9, 2021)</td>
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</tbody>
</table>
2021-22 Draft Operating Budget Calendar

Feb. 8, 2021  Send to campuses:
•  Energy and Utilities Actuals for budget planning

Mar. 5, 2021  Receive from campuses:
Course and Admin Fees request

Mar. 15, 2021  Receive from campuses:
•  Budget Reduction/Reallocation Summary Updates
•  5 year Budget Model & Narratives – Regional Campuses and UA units

Mar. 19, 2021  Receive from Investment and Debt Management:
•  Debt service obligations

Mar. 22, 2021  Receive from campuses:
•  5 year Budget Model & Narratives – BL, IN, IUSOM

Mar. 23, 2021  Request from Office of Research Administration:
•  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:
•  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:
•  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)
•  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:
•  Contracts & Grants expenditure projections
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:
• 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
• Budget Narratives due
• University Fiscal Analysis due
• Union negotiations complete

June 1, 2021  Detailed Budget Construction ends; no changes without UBO approval
• 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
2021-22 Draft Operating Budget Calendar

Week of June 21, 2021  Departmental work papers available

June 21, 2021        July 1 Archive