

FY09 Budget Development University Units

Important Dates

January	1	Holiday
January	4	Send out tax allocation factors
January	7	FY09 Governor's Proposed Budget Released
January	10	CHE Commission Meeting Finance and Facilities
January	10	"E" Fund Review - All units
January	11	Complete BOT Quarterly Reports
January	16	Base Tax Workbook Allocation Factors - Comments due back
January	17	Base Tax Workbook - Allocations Out
January	17	Campus information due for House Ways & Means subcommittee presentation
January	21	Holiday
January	21	Review Fall Tuition finals- academic units submit BD's to align Fall tuition budget to actual
January	24	Columbia Auxiliary Units and Senior & Regional Campuses Mid-Year Review Comments Due Feb 1
January	22	House Ways & Means Subcommittee Presentation - 2:00 P.M.
January	28	Review Evening Program Fall Finals - Notify Academic Units
January	30	Brown Bag Lunch - Columbia Academic Units - Five Year Budget Plan
January		Rescheduled 2009 E Fund Training - HR Professional Development
February	1	Mid-Year Review Comments Due from Columbia Auxiliary Units and Senior & Regional Campuses
February	7	Brown Bag Lunch - Columbia Units - Human Resources/FTE/EEO
February	7	CHE Commission Meeting Finance and Facilities
February	12	Accounting/Budget Tools Training - HR Professional Development
February	20	FREEZE - Recurring Budget Transfer Deadline
February	20	Brown Bag Lunch - Columbia Service Units - Five Year Budget Plan - CANCELED
February	27	A Fund Budget Training - HR Professional Development
February	29	Columbia Base Budget Freeze
February	29	"A" Fund Spring Review
March	3	Comprehensive Perm Improvement Plan (CPIP) DUE to CHE
March	3	Update on FY08 Initiatives - DUE BACK 3/14
March	5	BOT Fiscal Policy Committee
March	6	CHE Commission Meeting Finance and Facilities

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March	7	Academic Units - Blueprint and five-year budget plan due
March	11	Tuition & Fees: Memo to Columbia campus departments for FY09 fee requests - due back 4/1
March	11	Tuition & Fees: Memo to Senior and Regional Campuses for FY09 fee requests - due back 4/1
March	11	Initiatives: Memo request to VP's for FY09 initiatives, due back 4/1
March	11	New Web Tools Introduction - Tuition & Fees, User Fees, Initiatives UTS Auditorium 11:00 a.m. - 11:50 a.m. (Session 1) Noon - 1:00 p.m. (Session 2)
March	12	User Fee changes: Request to Columbia Units for FY08 changes/ new fees - due back 4/1
March	5-13	Spring Review - all units
March	14	Spring Review: send out to all units - response due back 3/28
March	14	Update on FY08 Initiatives Due Back
March	17	Service Units: Review Unit Description, revisions due 3/30
March	18	Senate Finance Subcommittee presentation - 2:00 PM
March	28	Spring Review: Units responses due in Budget Office
March	30	Service Units: Description revision due in Budget Office
March	19-31	Provost Academic Unit Meetings
April	1	Tuition and Fees: Columbia Campus due in Budget Office (include distribution)
April	1	User fee requests and changes due in Budget Office
April	1	FY09 Tuition & Fees Requests DUE from Senior & Regional Campuses
April	1	Initiatives due to Budget Office
April	1	Service Unit Blueprints Due
April	1	Spring Review: Roll up unit responses for Provost and CFO
April	3	User fee requests summarized for VP approval and Administrative Council
April	3	CHE Commission Meeting Finance and Facilities
April	7	Tuition and Fees: Consolidate list of requests for VP's send out for comment Due 4/18
April	7	Summary of Initiative requests available
April	7	Complete BOT Quarterly Reports
April	11	Board of Trustees Meeting
April	14	Senior and Regional Campuses: BOT budget packages available - Due 5/2
April	14	Auxiliary Units: BOT budget packages available- Due 4/28
April	17	FY09 Annual Web-Based Budget/Carryforward Workshop All Columbia Units UTS Auditorium 11:00 a.m. - 11:50 a.m. (Session 1) Noon - 1:00 p.m. (Session 2)
April	17	Carryforward Estimate templates out to all units, due back 4/30
April	18	All Columbia Units begin line-item A fund budget entry, Due 5/5

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	April	18	Tuition and Fees: VP recommendations due in Budget Office
ESTIMATED	April	18	OSB Letter to President - Baldrige Accountability Report
	April	28	Preliminary Meeting with Bursar re: Tuition and Fee Schedules
	April	28	BOT Budget packages due from Auxiliary Units
	April	30	Carryforward estimates from all units DUE
	May	1	CHE Commission Meeting Finance and Facilities
	May	2-15	Budget Hearings with President
	May	2	Senior and Regional Campuses: BOT documents due in Budget Office
	May	5	Service and Academic Units: FY2009 Web-based Budget due to Budget Office
	May	7-18	Balance Columbia line-item budget and run test g/l
	May	15-16	CHE Finance Officer's Retreat
TENTATIVE	May	20	Finalize tuition and fees - President approves Initiatives
	May	22	Brown Bag Lunch - Legal Contracts
	May	27	Second Preliminary Meeting with Bursar re: Tuition and Fee Schedules
	May	20-28	BOT Document Preparation
	May	28-30	Draft of BOT document complete
	May	30	BOT Travel Document complete
	May	UNKNOWN	Review Spring Tuition finals- academic units submit BD's to align Spring tuition budget to actual
	May	UNKNOWN	Review Evening Program Spring Finals - Notify Academic Units
	June	5	Sine Die
	June	5	CHE Commission Meeting Finance and Facilities
	June	11	BOT Executive Committee Mailout deadline for 6/18
	June	10-13	BOT Travel Dates
	June	13	Senior and Regional Campuses: Workbooks available for line item budget submission - Due 7/9
	June	13	Auxiliary Units: Request line-item budget submission - Due 7/9
	June	16-17	Prepare and finalize BOT presentation for June 18
	June	18	BOT Executive Committee - FY09 Budget Review
	June	18	Finalize Tuition and Fee Schedule and Board Mandated Fee Distribution - Send to Bursar's Office
	June	18-19	Complete final edits of BOT document- send to printer
	June	20	BOT mailout deadline
	June	25-26	Prepare and finalize BOT presentation for June 27
	June	27	Full BOT meeting- FY09 Budget

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	June	UNKNOWN	FY2010 BELOW-THE-LINE Submission to Units
	June	UNKNOWN	Review Summer I Tuition finals- academic units submit BD's to align Summer I tuition budget to actual
	June	UNKNOWN	Review Evening Program Summer I Finals - Notify Academic Units
	June	*****	NO BROWN BAG THIS MONTH
	July	1	Notify Campuses - CHE Presentation and Legislative Priorities DUE July 16
	July	4	Holiday
	July	7	Senior and Regional Campuses: Line-Item budget due
	July	7-9	LOAD FY09 Columbia Line Item and Campuses as available
	July	9	Auxiliary and School of Medicine: Line-item budget due
	July	9	Complete BOT Quarterly Reports - Preliminary
	July	14	Carryforward preliminary
	July	14	Notice of BOT Approved Initiatives out to Columbia Units
	July	15	FY2010 BELOW-THE-LINE Submission to CHE
	July	16	Campus Information due for CHE Presentation
	July	21	Carryforward preliminary
	July	28	Carryforward preliminary
	July	28	Initiatives info due back from units
	July	UNKNOWN	FY2010 Agency Activity Inventory due to OSB estimated Aug 15
	July	TBA	Brown Bag - FY2009 Budget
	August	4	Carryforward - Fourth Post Close
	August	4-8	Budget Office compile information for Baldrige Accountability Report
	August	4 or 11	Carryforward out to Columbia Units (depends on Controller's Schedule)
	August	6	CHE Finance and Facilities Meeting
	August	6	CHE President's Presentation 3:15 - 5:15
	August	8	Board of Trustees Executive Committee
ESTIMATED	August	15	FY2010 Agency Activity Inventory DUE to OSB
	August	18	Carryforward BD's due back from units
	August	UNKNOWN	Brown Bag Lunch
	August	UNKNOWN	Review Summer II Tuition finals- academic units submit BD's to align Summer II tuition budget to actual
	August	UNKNOWN	Review Evening Program Summer II Finals - Notify Academic Units
	September	1	Holiday
	September	2-5	EARLY - Recalculation of FY09 tax, spread BOT initiatives, tuition increase

**FY09 Budget Development
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	September	4	CHE Finance and Facilities Meeting
ESTIMATED	September	15	Baldrige Accountability Report DUE OSB
	September	UNKNOWN	Brown Bag Lunch
	October	2	CHE Finance and Facilities Meeting
	October	10	Complete BOT Quarterly Reports
	October	15	CHE 100 Report Academic Fee Calculation DUE
ESTIMATED	October	17	State line Item detail budget
	October	24	Board of Trustees Executive Committee
	October	31	CHE 150 Report DUE to CHE
	October	31	Endowment Incentive Report
	October	UNKNOWN	Brown Bag Lunch
	October	UNKNOWN	Unit meetings with Academic units and Deans
	November	6	CHE Commission Meeting Finance and Facilities
	November	10-14	Fall Review - All Columbia Units
	November	17	Fall Review: send out to all units - response due back 11/17
	November	27-28	Holiday
	November	UNKNOWN	Brown Bag Lunch
	December	1	Fall Review: unit responses due back
	December	3-5	Fall Review: Roll up responses for Provost VPRHS and CFO
	December	4	CHE Commission Meeting Finance and Facilities
	December	15	Board of Trustees Eecutive Committee
	December	24-31	Holidays
	December	UNKNOWN	Brown Bag Lunch
	January	1-2	Holidays (2nd is tentative)