FY09 Budget Development
Academic Units

Important Dates

January 1    Holiday
January 4    Send out tax allocation factors
January 7    FY09 Governor's Proposed Budget Released
January 10   "E" Fund Review - All units
January 16   Base Tax Workbook Allocation Factors - Comments due back
January 17   Base Tax Workbook - Allocations Out
January 21   Holiday
January 21   Review Fall Tuition finals- academic units submit BD's to align Fall tuition budget to actual
January 28   Review Evening Program Fall Finals - Notify Academic Units
January 30   Brown Bag Lunch - Columbia Academic Units - Five Year Budget Plan

February 7   Brown Bag Lunch - Columbia Units - Human Resources/FTE/EEO
February 20  FREEZE - Recurring Budget Transfer Deadline
February 22  Academic Units - Blueprint and five-year budget plan due
February 27  A Fund Budget Training - HR Professional Development
February 29  Columbia Base Budget Freeze
February 29  "A" Fund Spring Review

March 3      Update on FY08 Initiatives - DUE BACK 3/14
March 11     Tuition & Fees: Memo to Columbia campus departments 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 11     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 28     Spring Review: Units responses 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      Initiatives due to Budget Office
April 1      Spring Review: Roll up unit responses for Provost and CFO
April 1      User fee requests and changes due in Budget Office

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FY09 Budget Development

Academic Units

April
3: User fee requests summarized for VP approval and Administrative Council
7: Summary of Initiative requests available
7: Tuition and Fees: Consolidate list of requests for VP’s send out for comment Due 4/18
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)
17: Carryforward Estimate templates out to all units, due back 4/30
18: All Columbia Units begin line-item A fund budget entry, Due 5/5
18: Tuition and Fees: VP recommendations due in Budget Office
30: Carryforward estimates from all units DUE

May
2-15: Budget Hearings with President
5: Service and Academic Units: FY2009 Web-based Budget due to Budget Office
20: Finalize tuition and fees - President approves Initiatives
22: Brown Bag Lunch - Legal Contracts
TENTATIVE
UNUNKNOWN: Review Spring Tuition finals- academic units submit BD's to align Spring tuition budget to actual
UNUNKNOWN: Review Evening Program Spring Finals - Notify Academic Units

June
5: Sine Die
18: BOT Executive Committee - FY09 Budget Review
18: Finalize Tuition and Fee Schedule and Board Mandated Fee Distribution - Send to Bursar's Office
27: Full BOT meeting- FY09 Budget
UNUNKNOWN: FY2010 BELOW-THE-LINE Submission to Units
UNUNKNOWN: Review Summer I Tuition finals- academic units submit BD's to align Summer I tuition budget to actual
UNUNKNOWN: Review Evening Program Summer I Finals - Notify Academic Units
************: NO BROWN BAG THIS MONTH

July
4: Holiday
7-9: LOAD FY09 Columbia Line Item and Campuses as available
14: Carryforward preliminary
14: Notice of BOT Approved Initiatives out to Columbia Units
15: FY2010 BELOW-THE-LINE Submission to CHE
21: Carryforward preliminary
28: Carryforward preliminary
28: Initiatives info due back from units

Revised 1/29/08
## FY09 Budget Development
### Academic Units

<table>
<thead>
<tr>
<th>Month</th>
<th>Date</th>
<th>Event Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>July</td>
<td>TBA</td>
<td>Brown Bag - FY2009 Budget</td>
</tr>
<tr>
<td>August</td>
<td>4</td>
<td>Carryforward - Fourth Post Close</td>
</tr>
<tr>
<td>August</td>
<td>4 or 11</td>
<td>Carryforward out to Columbia Units (depends on Controller's Schedule)</td>
</tr>
<tr>
<td>August</td>
<td>8</td>
<td>Board of Trustees Executive Committee</td>
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<tr>
<td>August</td>
<td>18</td>
<td>Carryforward BD's due back from units</td>
</tr>
<tr>
<td>August</td>
<td>UNKNOWN</td>
<td>Brown Bag Lunch</td>
</tr>
<tr>
<td>August</td>
<td>UNKNOWN</td>
<td>Review Summer II Tuition finals: academic units submit BD's to align Summer II tuition budget to actual</td>
</tr>
<tr>
<td>August</td>
<td>UNKNOWN</td>
<td>Review Evening Program Summer II Finals - Notify Academic Units</td>
</tr>
<tr>
<td>September</td>
<td>1</td>
<td>Holiday</td>
</tr>
<tr>
<td>September</td>
<td>2-5</td>
<td>EARLY - Recalculation of FY09 tax, spread BOT initiatives, tuition increase</td>
</tr>
<tr>
<td>September</td>
<td>UNKNOWN</td>
<td>Brown Bag Lunch</td>
</tr>
<tr>
<td>October</td>
<td>24</td>
<td>Board of Trustees Executive Committee</td>
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<tr>
<td>October</td>
<td>UNKNOWN</td>
<td>Brown Bag Lunch</td>
</tr>
<tr>
<td>October</td>
<td>UNKNOWN</td>
<td>Unit meetings with Academic units and Deans</td>
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<tr>
<td>November</td>
<td>10-14</td>
<td>Fall Review: All Columbia Units</td>
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<tr>
<td>November</td>
<td>17</td>
<td>Fall Review: send out to all units - response due back 11/17</td>
</tr>
<tr>
<td>November</td>
<td>27-28</td>
<td>Holiday</td>
</tr>
<tr>
<td>November</td>
<td>UNKNOWN</td>
<td>Brown Bag Lunch</td>
</tr>
<tr>
<td>December</td>
<td>1</td>
<td>Fall Review: unit responses due back</td>
</tr>
<tr>
<td>December</td>
<td>3-5</td>
<td>Fall Review: Roll up responses for Provost VPRHS and CFO</td>
</tr>
<tr>
<td>December</td>
<td>15</td>
<td>Board of Trustees Executive Committee</td>
</tr>
<tr>
<td>December</td>
<td>24-31</td>
<td>Holidays</td>
</tr>
<tr>
<td>December</td>
<td>UNKNOWN</td>
<td>Brown Bag Lunch</td>
</tr>
<tr>
<td>January</td>
<td>1-2</td>
<td>Holidays (2nd is tentative)</td>
</tr>
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