INDIANA UNIVERSITY
2008-09 OPERATING BUDGET

Processing Schedule

Due date	
Fall, 2007	Send to Campuses: • Fall Enrollment Study Request & Receive from Campuses • 10-year plan (for Capital Appropriation Request planning) University initiatives for operating request: theme – President, Trustees Campus priorities: new degrees, quality improvements – deans, chancellors
November 7, 2007	Request from campuses: • Non-instructional fee rates
December 6-7, 2007	Trustee meeting – IUPUI
December 10, 2007	Receive from campuses: • Non-instructional fee rates
December 11, 2007	Request from campuses: • 2008-09 estimates for energy, utilities, and plant expansion
Winter, 2008	Send to campuses: • University Tax (and President's Fund if implemented)
Early January, 2008	Request from campuses: • Identification of all base transfers anticipating any reorganization or reallocation plans • Incidental fee income (inc-inc) and other income by campus and RC – estimates for 07-08 and projections for 08-09 Request from Risk Management • Insurance rates
Jan 31-Feb 1, 2008	Trustees meeting – IU East
Early February, 2008	Request from Investment and Debt Management: • Debt service obligations Refinement of planning for 2009-11 Capital Appropriation Request and Operating Appropriation Request parameters Send to campuses: • Spring semester credit hour enrollments by responsibility center Request from campuses: • Spring Fiscal analysis • Credit hour enrollment estimates for 2008-09
February 11, 2008	Receive from campuses: • 2008-09 estimates for energy, utilities, and plant expansion
Mid-February, 2008	Receive from campuses: • Spring fiscal analysis All organizational changes in place

Late February, 2008	Send to campuses: • 2008-09 benefit rates • 2008-09 energy, utilities, and plant expansion estimates Receive from campuses: • Spring semester credit hour enrollments by RC • 2008-09 credit hour enrollment estimates
Late February, 2008	Receive from campuses: ▪ 2008-09 non-instructional fee income (inc-inc) and other income estimates Receive from Investment and Debt Management: • Debt service obligations for 2008-09
Mid March, 2008	Send to campuses: • Instructions & Guidelines
Spring, 2008	Review of ten-year capital plans – President Approval of ten-year capital plans – Trustees Data-driven components of the operating request: enrollments, unavoidables, plant expansion – University Budget Office, campuses Review of operating and capital requests – President Approval of operating and capital requests – Trustees
Mid March, 2008	Capital Appropriation Request: submission of ten-year plan for capital improvements to budget committee
Mid April, 2008	Final review of 2008-09 estimate of funds available
April 30-May 2, 2008	Trustee meeting – Bloomington
End of May, 2008	Union negotiations completed
June 1, 2009	Appropriation request: submission of capital appropriation request to ICHE, others
June 19-20, 2008	Trustee meeting – Kokomo
June-August, 2008	ICHE review, questions regarding Capital Request

<u>Spring Break:</u>

Bloomington (BL)	March 10-14	Kokomo (KO)	March 10-14
Columbus Center (CC)	March 17-21	Northwest (NW)	March 10-14
East (EA)	March 17-21	South Bend (SB)	March 10-14
Fort Wayne (FW)	March 10-16	Southeast (SE)	March 24-29
IUPUI (IN)	March 10-14		