

FY19 Budget Development

ALL UNITS AND CAMPUSES		
Month	2018	Event
January	1	Holiday - New Year's Day (First 2018 Holiday)
January	4	Commission on Higher Education Meeting
January	8	Budget Staff Meeting
January	8	FY19 Governor's Proposed Budget Released - estimated
January	9	General Assembly reconvenes
January	10	Review Month-End Columbia Schedules including State Budget to Actual - December
January	12	Mid-Year Reviews - all system campuses and Columbia auxiliaries - transmitted
January	15	Review Fall and Spring Tuition and Fees
January	15	Holiday - MLK Day
January	17	Budget Update Group
January	19	Roll up of User Fees to Chief Operating Officer / Budget Update Group
January	19	"R" Funds Quarterly Recap
January	19	Mid-Year Reviews due back - all System Campuses and Columbia auxiliaries - returned
January	23	House Ways & Means Subcommittee Presentation - President & BUG
January	25	Mid-Year Review finalized and sent to VP for Finance and CFO
January	25	Board of Economic Advisors (BEA) Meets
January	31	Carolina Action Network Day at the Statehouse
January	23-25	Compile Board of Trustees Meeting Mid-Year Review through 12/31/2017
January	26-27	Board of Trustees Retreat
January	TBD	Call for Academic Unit Blueprint Development

Subject to change as the year progresses.

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Month	2018	Event
February	1	Commission on Higher Education Meeting
February	1	Budget Update Group
February	5	Budget Staff Meeting
February	7	Senate Finance Higher Education Subcommittee survey via CHE
February	8	A Fund Budget Training - HR Professional Development
February	9	Review Fall and Spring Tuition and Fees
February	9	Board of Trustees Meeting - Building & Grounds, Intercollegiate Athletics, Executive Committee, Full Board
February	9	Three-Year Academic Unit Templates prepared based on January 31 data.
February	10	Review Month-End Columbia Schedules including State Budget to Actual - January
February	12	Tuition & Fee Solicitation Begins - System Campuses - due back March 9 (Janis Hoffman)
February	15	Board of Economic Advisors (BEA) Meets - estimate due
February	20 - 22	House Ways & Means Budget Finalizes Committee Budget
February	23	Deadline for Columbia - ALL BD's
February	23	Campus Budget Meetings
February	28	Budget Update Group
February	28	Debt Collection Report (State Appropriation Act Proviso) due
February	28	"A" Fund Spring Review Data Collection Date
February	28	FREEZE - Recurring Columbia "A" Fund Budget
February	N/A	CHE 100 Report (Spring tuition)

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Month	2018	Event
March	TBD	Academic Units - DRAFT Blueprint due (does not include five-year financial plan)
March	1	Commission on Higher Education Meeting
March	2	Service Units: Review Unit Description - revisions due 3/23/18
March	5	Initiative request guidelines sent to Vice Presidents (due April 5)
March	5	Budget Staff Meeting
March	5	Three-Year Academic Unit Templates due
March	5 - 9	Spring Review Data Collection and Preparation - All Columbia Units
March	5 - 20	Budget Office completes Columbia "A" fund base line item budget. Run reports, test, balance, etc.
March	6	Call for Service Unit Blueprint development (due April 6 to Brunelli)
March	9	Tuition & Fee Solicitation ENDS - Due Back in Budget Office (Janis Hoffman)
March	10	Review Month-End Columbia Schedules including State Budget to Actual - February
March	12	Columbia Tuition Update
March	12 - 15	House Floor Budget Deliberations
March	13	Budget Update Group
March	14	All Fund Type Budget workbooks sent to Columbia Units (due April 16)
March	14	Spring Reviews transmitted to Columbia Units with due date of 23th
March	TBD	Senate Finance Committee presentation - President
March	16	Board of Trustees Committees - Academic Affairs & Faculty Liaison, Health Affairs, Audit & Compliance
March	20	Final Balancing of Columbia "A" Fund budget for posting to Web based system
March	22	Chief Operating Officer reviews and approves User Fees
March	22	Board of Economic Advisors (BEA) Meets
March	23	Roll-up of FY19 Tuition and Fee requests to VP for Finance and CFO
March	23	Spring Review: Unit responses due in Budget Office
March	23	Service Units: Description revisions due to Budget Office
March	28	Columbia Units begin line-item A fund budget entry - due 4/6/18. Unit access, address inquiries, etc.
March	27	Preliminary meeting with Bursar Staff: Tuition and Fee Schedules (tentative date)
March	27, 28, 30	Provost Academic Unit Meetings

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Month	2018	Event
April	2	Budget Staff Meeting
April	2	Provost Academic Unit Meetings
April	2 - 6	Compile Spring Reviews for Budget Update Group
April	5	Auxiliary Units: BOT budget packages available - due 4/17/18
April	5	Commission on Higher Education Meeting
April	5	Initiative request deadline - Columbia.
April	6	Provide BOT Budget packages to System Campuses: due 4/20/18
April	6	Columbia Service Units - Blueprints due.
April	6	Columbia Service and Academic Units: FY2019 Web-based Budget system closed
April	6	Carryforward Estimate templates out to all Columbia units - DUE Back 4/16/18
April	9	Campuses begin line-item Web based A fund budget entry.
April	9	Board of Economic Advisors (BEA) Meets
April	9, 10 & 30	President's Budget Hearings - Columbia Units & Campuses
April	9 - 13	Balance Columbia Line Item Budget and run test G/L. Run reports, balancing, etc.
April	10	Review Month-End Columbia Schedules including State Budget to Actual - March
April	11	Columbia Tuition Update
April	12	Budget Update Group
April	13	Complete Board of Trustees Quarterly Reports
April	13	"R" Funds Quarterly Recap
April	16	All Fund Type Budget workbooks and Carryforward Estimate templates due back from Columbia units
April	17	Columbia Auxiliary Board of Trustees Meeting Documents due back in Budget Office
April	20	Board of Trustees Meeting - Building & Grounds, Executive Committee, Student-Trustee Liaison, Full Board
April	20	System Campus Budget Documents due back in Budget Office
April	30	Budget Update Group
April	TBD	Senate Finance Budget Development

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Month	2018	Event
May	TBD	Senate Floor Budget Deliberations
May	1 - 11	Board of Trustees Budget Document Preparation. Reports, schedules preparation, balancing, etc.
May	3	Commission on Higher Education Meeting
May	7	Budget Staff Meeting
May	10	Budget Update Group
May	10	Sine Die (General Assembly adjourns) - second Thursday in May per Act 199 of 2016
May	11	Columbia Tuition Update
May	11	Review Month-End Columbia Schedules including State Budget to Actual - April
May	11	Review Spring Tuition and Fees
May	17	Budget Briefing Materials complete by COB
May	17	Draft of Board of Trustees Budget Document Complete
May	17	Finalize tuition and fees - President approves budget
May	17	Board of Economic Advisors (BEA) Meets
May	22	Budget Update Group
May	TBD	Budget Recap meeting with President
May	24 - 31	Budget Briefings - Board of Trustees Members
May	25	Second meeting with Bursar re: Tuition and Fee Schedules (Tentative)
May	TBD	Media Relations Meeting
May	28	Holiday - National Memorial Day

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Month	2018	Event
June	4	Budget Staff Meeting
June	4 - 8	Complete final edits of Board of Trustees document- send to printer pending adoption of State Budget
June	4 - 8	Prepare and finalize Board of Trustees presentation for June 22, 2018
June	7	Commission on Higher Education Meeting
June	7	Auxiliary Units: Request line-item budget submissions - due 7/6/18
June	8	Board of Trustees Committees - Academic Affairs & Faculty Liaison, Intercollegiate Athletics, Audit & Compliance
June	8	BOT mail out deadline
June	8	Finalize Tuition and Fee Schedule and Board Mandated Fee Distribution - Send to Bursar's Office
June	12 - 14	Develop, Edit and Finalize Presentation for June 22, 2018 Board of Trustees Meeting
June	14	Review Summer Tuition and Fees
June	14	Columbia Tuition Update
June	14	Review Month-End Columbia Schedules including State Budget to Actual - May
June	14	Budget Update Group
June	14	Board of Economic Advisors (BEA) Meets
June	27	Budget Update Group
June	22	Board of Trustees Meeting - Executive Committee, Full Board - FY19 Budget, Lunch w/Board of Visitors
June	TBD	EBO Letter to President - Baldrige Accountability Report

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Month	2018	Event
July	2 - 20	Ensure all year-end transactions are completed in accordance with Controller schedule
July	2 - 27	Year-End Review: prepare, transmit to Campuses & Aux Units, compile responses, complete document
July	2	Budget Staff Meeting
July	4	Holiday - Independence Day
July	6	CHE 100 Report due (Fall tuition)
July	6	Auxiliary and School of Medicine: Line-item budget due
July	10	Review Month-End Columbia Schedules including State Budget to Actual - June
July	9 - 13	Load FY19 Columbia Line Item and Campuses as available
July	11 - 13	Review Summer Tuition and Fees
July	12	Columbia Tuition update
July	12	"R" Funds Quarterly Recap
July	13	Carryforward preliminary update
July	13	Notice of BOT Budget items out to Columbia units
July	13	Campus Information due for CHE Presentation
July	20	Carryforward preliminary update
July	26	Board of Economic Advisors (BEA) Meets
July	27	Carryforward from Final Post Close (Tentative)
August	2	Commission on Higher Education Meeting
August	6	Budget Staff Meeting
August	6	Begin Compiling System Year-End Review - final by September 8, 2018
August	6 - 10	Budget Office compile information for Baldrige Accountability Report
August	6 - 17	Budget Office completes Carryforward surtax
August	10	Governor's Budget Submission instructions issued- Tentative
August	10	Review Month End Columbia Schedules including State Budget to Actual - July
August	14	Columbia Tuition Update
August	17	Board of Trustees Meeting - Audit & Compliance, Executive Committee, Full Board, Strategic Planning
August	24	Carryforward out to Columbia Units
August	29	Board of Economic Advisors (BEA) Meets
August	31	Fees & Fines Report (State Appropriation Act Proviso) due September 1 -- post on Web by that date

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Month	2018	Event
September	3	Holiday - Labor Day
September	4	Budget Staff Meeting
September	6	Commission on Higher Education Meeting
September	8	Finalize System Year-End Review
September	8	Review Summer Tuition and Fees
September	10	Review Month-End Columbia Schedules including State Budget to Actual - August
September	13	Columbia Tuition Update
September	14	Board of Trustees Committees - Intercollegiate Athletics, B&G, Health Affairs, Academic Affairs & Faculty Liaison
September	15	State line Item Detail Budget completed
September	15	Accountability Reports (State Appropriation Act Proviso - Base Budget) due date for Posting on Web
September	15	Governor's Budget Request - traditionally due this date
September	20	Board of Economic Advisors (BEA) Meets
October	1	Year End Financial Statements - Controller
October	1	Lottery Funds Monitoring Procedures - Proviso
October	1	Budget Staff Meeting
October	4	Commission on Higher Education Meeting
October	10	Review Month-End Columbia Schedules including State Budget to Actual - September
October	11	Columbia Tuition Update
October	12	Complete Board of Trustees Meeting Quarterly Reports
October	12	"R" Funds Quarterly Recap
October	18	Board of Economic Advisors (BEA) Meets
October	19	Board of Trustees Meeting - Audit & Compliance, Executive Committee, Full BOT - USC Upstate
October	31	CHE 150 due (if solicited)
October	31	Academic Endowment Incentive Report due
October	31	Fall Review Data Collection Date

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Month	2018	Event
November	1	Outstanding Institutional Debt Report (State Appropriation Act Proviso) due November 1, 2018
November	1	Abatements Report (State Appropriation Act Proviso) due November 1, 2018
November	1	Travel Report (State Appropriation Act Proviso) due November 1, 2018
November	1	Commission on Higher Education Meeting
November	2	User Fees Solicitation - Columbia Campus - due back December 7, 2018
November	5	Budget Staff Meeting
November	5 - 9	Fall Review Data Collection and Preparation - All Columbia Units
November	8	Board of Economic Advisors (BEA) Meets
November	9	Columbia Tuition Update
November	9	Review Month-End Columbia Schedules including State Budget to Actual - October
November	12	Fall Review: send out to all units - Response due back 12/5/18
November	16	Board of Trustees Committees - Building & Grounds, Health Affairs, Student Trustee Liaison
November	22-23	Holidays
December	5	Fall Review: unit responses due back
December	6	Commission on Higher Education Meeting
December	7	User Fee Solicitation - due back in Budget Office
December	TBD	Academic Fee Calculation due to CHE (if requested)
December	10 - 14	Fall Review: Compile responses for Budget Update Group
December	10	Review Month-End Columbia Schedules including State Budget to Actual - November
December	13	Columbia Tuition Update
December	13	Board of Economic Advisors (BEA) Meets
December	18	Board of Trustees Meeting - Academic Affairs, Executive Committee, Full Board
December	24-31	Holidays
December	31	Data Collection Date for Campus and Columbia Auxiliary Mid-Year Reviews

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