Date	Responsible Party	Year	Action/Event	Audience	Operating Budget	Capital Budget	Performance	Personal Services	Notes
May - August	MAUs	FY25	Initial MAU performance reports created, including written analysis, definitions, baseline data	UA & MAU Leadership			PME Process		Designated coordinating point person assigned for UAA, UAF, UAS, SO, EE & UA reports
June	President and senior leadership	FY24	-Operating and Capital Budget Appropriation Acceptance -Operating and Capital Budget Distribution Plan Approval -Natural Resources Fund Budget Allocation Approval	BOR	OBD Process				
June	SO SPB	FY25	-Distribute instructions regarding: -Submitting Operating & Capital Budget Requests -Updating the 6-yr Capital Improvement Plan	MAUs	OBD Process	CBD Process			
June	UA Leadership	FY25	Budget, Goals, and Measures Planning Discussion	BOR	Yes		Yes		
June - 20th	MAUs	FY24	Initial budget entries due	SO SPB	Yes				
June - 26th	SO SPB	FY24	Initial budget entries to Finance	SO Finance	Yes				
June - 26th	SO SPB	FY24	Initial position budget entries to HR	SO HR	Yes				
June 26th - June 30th	SO HR	FY24	-No position data entry (NBAPOSN/NBAPBUD) after 5pm until notified by SO HR -HR Budgets Rolls to Zero through Budget activation	MAUs	Yes			Yes	Scroll to Fiscal Year Close Procedures
June - 30th	SO Finance	FY24	Temporary unrestricted budgets reversed and permanent budgets loaded	MAUs	Yes				Scroll to Year End Instructions

UA Strategy, Planning and Budget Calendar

(last updated 5-22-2023)

All dates are subject to change as more/different guidance becomes available or specific dates will be provided when instructions are distributed

Date	Responsible Party	Year	Action/Event	Audience	Operating Budget	Capital Budget	Performance	Personal Services	Notes
September	UA Leadership	FY25	Initial Meetings with OMB	OMB	OBD Process				
September	SO SPB	FY24	Capital Appropriation History Updated	UA		CAT Process			
September (late)	SO SPB	FY24	Authorized Budget Distribution Document (Yellowbook) Published	UA					
October	MAUs	FY25	Complete MAU Level Operating Budget Narratives & Org Charts for ABS	SO SPB	Yes				
October	SO SPB	All	Capital Committed Funds & Transfer Reports Created	BOR		CAT Process			
October (late)	SO SPB	FY25	UA Level Narrative Submitted	OMB	Yes				
November (early)	UA Leadership	FY25	Approval: Operating Budget Request Capital Budget Request 6-yr Capital Improvement Plan	BOR	OBD Process	CBD Process			
November (early)	SO Finance	FY23	Financial Statements Audited Financial Statements Available	BOR					
November	SO SPB	FY25	MAU Level Operating Budget Narratives & Org Charts in ABS	OMB	Yes				
November	SO SPB	FY25	Submitted: Operating Budget Capital Budget	OMB	OBD Process	CBD Process			

Date	Responsible Party	Year	Action/Event	Audience	Operating Budget	Capital Budget	Performance

UA Strategy, Planning and Budget Calendar

(last updated 5-22-2023)

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Date	Responsible Party	Year	Action/Event	Audience	Operating Budget	Capital Budget	Performance	Personal Services	Notes
Feb - March	UA Leadership	FY25	Amendment Request Approval (if applicable)	BOR	Yes	Yes			
Feb - March	UA Leadership	FY25	Budget Request - Legislative Status Report	BOR	Yes	Yes			
Feb - March	Governor	FY25	Amended budget scenario released	Legislature	Yes	Yes			
March (early)	MAUs	FY24	Lapsing Capital Appropriations Review/Extension Requests	SO SPB		CAT Process			
April (early)	MAUs	FY24	University Spring Management Report Review	UA Leadership	Yes	Yes			
April - 15th	UA Leadership	AY25	Tuition Rate Notice (letter from the President per BOR P05.10.060)	BOR					
April	UA Leadership	FY24	Budget Request - Legislative Status Report	BOR	Yes	Yes			
April - June	SO SPB	FY24	Lapsing Capital Appropriations Reviewed/Extended	DoF		CAT Process			
April	SO SPB	FY25	Operating and Capital Budget Distribution Plan Recommendation Developed	UA Leadership	OBD Process	CBD Process			
April (late)	SO SPB	All	Capital Committed Funds & Transfer Reports Created	BOR		CAT Process			
May	Legislature	FY25	Leg: Budget submitted to Governor for signature and veto review Gov: Operating and capital bills are signed	Governor	Yes	Yes			
May	SO DAIR	FY26	Updated Draft Performance Management Evaluation Procedures Distributed	MAUs			PME Process		Designated coordinating point person assigned for UAA, UAF, UAS, SO, EE & UA reports
May	SO Finance	FY25	Temporary budgets rolled in Banner	MAUs	Yes				Link to Finance year end calendar