

**SANTA CLARA UNIVERSITY  
2011-12 BUDGET SCHEDULE**

**CURRENT OPERATIONS  
ALL FUNDS**

<b>Target Completion/Due Dates</b>	<b>Action</b>	<b>Responsible Office</b>	<b>Category</b>
February 1 - 11	Hold preliminary meetings with Budget Office, Provost's Office and school/unit budget liaisons to discuss process, timeline, tools	Budget Office & Provost's Office	Budget and Financial Management Information
February 17	University Budget Forum / Business Manager's Meeting / Preliminary Budget Planning Schedule	All Business Managers	Budget and Financial Management Information
February 25	Budget and financial management structure confirmed with Deans, Vice Provosts, and Associate/Assistant Vice Presidents	Budget Office and Provost's Office	Budget and Financial Management Information
February 25	2011-12 performance planning information distributed	Human Resources	Staff Positions & Salaries
March 1	Faculty salary planning information distributed to Deans	Provost's Office	Faculty Positions, Salaries & Other Pay
March 8	PeopleSoft systems updated with structural changes	Budget Office	Budget and Financial Management Information
March 14	Student fee revenue confirmed with Deans and Vice Provosts	Budget Office & Provost's Office	Revenue, Endowment Income and Annual Gifts
March 14	Other sources of revenue confirmed with Deans, Vice Provosts, and Associate/Assistant Vice Presidents	Budget Office & Provost's Office	Revenue, Endowment Income and Annual Gifts
March 14	Use of annual gifts confirmed with Deans, Vice Provosts, and Associate/Assistant Vice Presidents	Budget Office & Provost's Office	Revenue, Endowment Income and Annual Gifts
March 14	Endowment income allocation amounts and uses confirmed	Controller's Office & Provost's Office	Revenue, Endowment Income and Annual Gifts
March 21	Information and instructions for student wage, operating expense, and transfer budgets to distributed Vice Presidents	Budget Office	Student Wages, Operating Expenses, & Transfers
March 22	Salary recommendations for tenured/tenure-track faculty, senior lecturers and current lecturers to Provost	Deans	Faculty Positions, Salaries & Other Pay

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March 27	Course release, course buyout, supplemental pay budgets and sources confirmed	Provost's Office with Dean, Vice Provosts, Center Executive Directors	Faculty Positions, Salaries & Other Pay
March 28	Budget allocation for student wages, operating expenses, and transfers confirmed with Deans, Vice Provosts, and Associate/Assistant Vice Presidents	Budget Office or Provost's Office	Student Wages, Operating Expenses, & Transfers
March 30	Staff salary planning instructions (not worksheets) distributed to Provost and Vice Presidents	Human Resources	Staff Positions & Salaries
April 1	Undergraduate enrollment, tuition, and financial aid budget information distributed to Deans and Vice Provosts	Provost's Office	Enrollment, Tuition, & Financial Aid
April 1	Freeze Position Data for New Hires and Internal Transfers for Salary Planning	Human Resources	Staff Positions & Salaries
April 15	Graduate enrollment, tuition, and financial aid budget information confirmed with Deans	Provost's Office	Enrollment, Tuition, & Financial Aid
April 15	Tuition and Student Fees schedule finalized and distributed	Provost's Office	Enrollment, Tuition, & Financial Aid
April 18	Staff salary planning worksheets distributed to Deans, Vice Provosts, and Associate/Assistant Vice Presidents	Provost and Vice Presidents	Staff Positions & Salaries
April 22	Staff performance planning documentation returned to Human Resources	Supervisors	Staff Positions & Salaries
April 26 - May 4	Conduct end user training in PeopleSoft Budget module	Budget Office	Budget and Financial Management Information
April 29	College/Schools/Units build sources and uses of operating budget	College/School/Unit Staff	Student Wages, Operating Expenses, & Transfers

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May 2	Budget allocation for library acquisitions confirmed with Vice Provost for Information Services	Budget Office	Library Acquisitions
May 4	Letters of appointment mailed to tenured and tenure-track faculty, senior lecturers and current lecturers	Provost's Office	Faculty Positions, Salaries & Other Pay
May 9	Staff salary planning worksheets returned to Human Resources	Provost and Associate/Assistant Vice Presidents	Staff Positions & Salaries
May 19	Payroll distributions from Human Resources confirmed by Budget office	Budget Office & Provost's Office	Staff Positions & Salaries
May 20	PeopleSoft entry (incl. revenue, student wages, operating expenses)	College/School/Unit Staff	Student Wages, Operating Expenses, & Transfers
May 20	Departmental budget planning completed (Information Services)	Vice Provost for Information Services	Library Acquisitions
June 3	PeopleSoft entry (input by Budget Office only) (incl. faculty/staff salary budgets, benefits budgets, endowment income, university allocation)	Budget Office	Student Wages, Operating Expenses, & Transfers
June 3	PeopleSoft entry of Library Acquisitions budget	Budget Office	Library Acquisitions
June 17	Faculty salary planning worksheets with final faculty salary budgets to deans and to Budget Office	Provost's Office	Faculty Positions, Salaries & Other Pay
June 17	Staff positions and salary budget confirmed with Deans, Vice Provosts, and Associate/Assistant Vice Presidents	Budget Office & Provost's Office	Staff Positions & Salaries
June 17	Merit Increase Letters distributed to Salary Planners	Human Resources	Staff Positions & Salaries
June 24	Total operating budgets confirmed with Deans, Vice Provosts, and Associate/Assistant Vice Presidents	Budget Office	Student Wages, Operating Expenses, & Transfers