

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

**CURRENT OPERATIONS
ALL FUNDS**

Action	Responsible Office	Target Completion/Due Dates
Budget and Financial Management Information		
Hold preliminary meetings with Budget Office, Provost's Office and school/unit budget liaisons to discuss process, timeline, tools	Budget Office & Provost's Office	February 1 - 11
University Budget Forum / Business Manager's Meeting / Preliminary Budget Planning Schedule	All Business Managers	February 17
Budget and financial management structure confirmed with Deans, Vice Provosts, and Associate/Assistant Vice Presidents	Budget Office and Provost's Office	February 25
PeopleSoft systems updated with structural changes	Budget Office	March 8
Conduct end user training in PeopleSoft Budget module	Budget Office	April 26 - May 4
Enrollment, Tuition, & Financial Aid		
Undergraduate enrollment, tuition, and financial aid budget information distributed to Deans and Vice Provosts	Provost's Office	April 1
Graduate enrollment, tuition, and financial aid budget information confirmed with Deans	Provost's Office	April 15
Tuition and Student Fees schedule finalized and distributed	Provost's Office	April 15
Revenue, Endowment Income and Annual Gifts		
Student fee revenue confirmed with Deans and Vice Provosts	Budget Office & Provost's Office	March 14
Other sources of revenue confirmed with Deans, Vice Provosts, and Associate/Assistant Vice Presidents	Budget Office & Provost's Office	March 14
Use of annual gifts confirmed with Deans, Vice Provosts, and Associate/Assistant Vice Presidents	Budget Office & Provost's Office	March 14
Endowment income allocation amounts and uses confirmed	Controller's Office & Provost's Office	March 14

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Faculty Positions, Salaries & Other Pay		
Faculty salary planning information distributed to Deans	Provost's Office	March 1
Course release, course buyout, supplemental pay budgets and sources confirmed	Provost's Office with Dean, Vice Provosts, Center Executive Directors	March 27
Salary recommendations for tenured/tenure-track faculty, senior lecturers and current lecturers to Provost	Deans	March 22
Letters of appointment mailed to tenured and tenure-track faculty, senior lecturers and current lecturers	Provost's Office	May 4
Faculty salary planning worksheets with final faculty salary budgets to deans and to Budget Office	Provost's Office	June 17
Staff Positions & Salaries		
2011-12 performance planning information distributed	Human Resources	February 25
Staff salary planning instructions (not worksheets) distributed to Provost and Vice Presidents	Human Resources	March 30
Freeze Position Data for New Hires and Internal Transfers for Salary Planning	Human Resources	April 1
Staff salary planning worksheets distributed to Deans, Vice Provosts, and Associate/Assistant Vice Presidents	Provost and Vice Presidents	April 18
Staff performance planning documentation returned to Human Resources	Supervisors	April 22
Staff salary planning worksheets returned to Human Resources	Provost and Associate/Assistant Vice Presidents	May 9
Payroll distributions from Human Resources confirmed by Budget office	Budget Office & Provost's Office	May 19
Staff positions and salary budget confirmed with Deans, Vice Provosts, and Associate/Assistant Vice Presidents	Budget Office & Provost's Office	June 17
Merit Increase Letters distributed to Salary Planners	Human Resources	June 17

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Student Wages, Operating Expenses, & Transfers		
Information and instructions for student wage, operating expense, and transfer budgets to distributed Vice Presidents	Budget Office	March 21
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	March 28
College/Schools/Units build sources and uses of operating budget	College/School/Unit Staff	April 29
PeopleSoft entry (incl. revenue, student wages, operating expenses)	College/School/Unit Staff	May 20
PeopleSoft entry (<i>input by Budget Office only</i>) (incl. faculty/staff salary budgets, benefits budgets, endowment income, university allocation)	Budget Office	June 3
Total operating budgets confirmed with Deans, Vice Provosts, and Associate/Assistant Vice Presidents	Budget Office	June 24
Library Acquisitions		
Budget allocation for library acquisitions confirmed with Vice Provost for Information Services	Budget Office	May 2
Departmental budget planning completed (Information Services)	Vice Provost for Information Services	May 20
PeopleSoft entry of Library Acquisitions budget	Budget Office	June 3