Annual Budget Request Timeline

- **August** – RUs and SUs meet with University Business Officers for an end-of-year summary and answer questions regarding prior year actuals. University Business Officers provide coming fiscal year template and SU budget memo to SUs
    - **Players:** RUs, SUs, University Business Officers, and Unit Business Officers

- **September – October** – University Business Officers provide coming fiscal year template and RU budget memo to RUs; pending date UW Oshkosh campus receives the Program Revenue Budget memo from UW System
    - **Players**: RUs, University Business Officers, and Unit Business Officers

- **October** – The Differential Tuition Committee receives budget requests from units funded by Differential Tuition; approvals issued by early November
    - **Players:** The Differential Tuition Committee and unit representatives making Differential Tuition budget requests

- **October** – The Student Technology Fee Committee receives budget requests from units for projects; approvals issued by early November
    - **Players:** The Student Technology Fee Committee and unit representatives making Student Technology Fee requests

- **October** – The Allocations Committee meets to consider Segregated Fee budget requests; approvals issued by Mid-November
    - **Players:** The Allocations Committee and student organization representatives making Segregated Fee budget requests

- **October** – SUs meet with University Business Officers to develop budget requests for their units
    - **Players:** SU Directors, University Business Officers, and SU budget personnel or Unit Business Officers

- **October** – SUs meet with corresponding Vice Chancellors to discuss expense and revenue targets for the coming fiscal year; adjusting budgets accordingly
    - **Players**: Vice Chancellors, SU Directors, and Unit Business Officers

- **Early November** – Segregated Fee Committee meets to consider Segregated Fee funding requests; approvals issued by end of December
    - **Players:** Segregated Fee Committee and Segregated Fee requesters

**This deadline will be adjusted pending Auxiliary Chargeback status in the new model **

- **Mid November** – Written divisional SU budget requests submitted to Sharepoint; coordinated by the Budget Office
    - **Players:** CBG, SUs, and University Business Officers

- **Early December** – CBG meet to discuss SU budget requests
    - **Players:** CBG and University Business Officers

- **Mid – Late December** – VC budget review meeting(s) conducted with Chancellor
    - **Players:** Chancellor, VC's and University Business Officers

- **1 January** – SU budget requests clarified, reviewed by CBG, recommended by VC's and approved by the Chancellor. Decisions communicated to the University Business Officers for entry. Assessment impact communicated to RUs for budget planning
    - **Players:** Chancellor, VC's, CBG, RUs, and University Business Officers

- **Early January** – Budget Office begins entry of SU budgets into UW System budget database
    - **Players:** University Business Officers and Unit Business Officers

- **Mid-January** – Auxiliaries determine rates for next fiscal year
    - **Players:** SSRUs and University Business Officers

- **Mid-January** – RUs meet with University Business Officers to develop budget requests for their units
    - **Players:** RU Deans/Directors, University Business Officers, and RU budget personnel or Unit Business Officers

- **Mid-January** – RUs meet with corresponding Vice Chancellors to discuss expense and revenue targets for the coming fiscal year; adjusting budgets accordingly
    - **Players:** Vice Chancellors, RU Deans/Directors, and Unit Business Officers

- **Late January** – Written RU budget requests submitted to Sharepoint; coordinated by the Budget Office
    - **Players**: CBG, RUs, and University Business Officers

- **Early February** – CBG meet to discuss RU budget requests
    - **Players:** CBG and University Business Officers

- **Early February** – VC's meet with Chancellor
    - **Players:** Chancellor, VC's and University Business Officers

- **February 12th** – RU budget requests clarified, reviewed by CBG, recommended by VC's and approved by Chancellor; decisions communicated to the University Business Officers for entry
    - **Players:** Chancellor, VC's, CBG, RUs, and University Business Officers

- **Mid-February** – Budget Office begins entry of RU budgets into UW System budget database
    - **Players:** University Business Officers and Unit Business Officers

- **March** – Budget Office conducts reconciliation of submitted and entered budgets into UW System budget database. Closeout process conducted
    - **Players:** Associate Vice Chancellor for Finance & Administration, Budget Director, and University Business Officers

- **March 25th – March 31st** – Chancellor meets with the Provost and the Vice Chancellor for Finance & Administration for final review of submitted campus budgets
    - **Players:** Chancellor, Provost and Vice Chancellor for Finance & Administration

- **April** – Budget requests due to UW System

    - **Players**: UW System, Budget Director, and University Business Officers

- **May/June** – Meetings conducted with RUs and SUs to relay decisions and final submitted budgets to UW System
    - **Players:** RUs, SUs, University Business Officers, and Unit Business Officers