

**UNIVERSITY OF ROCHESTER  
OFFICE OF BUDGETS AND PLANNING  
FISCAL YEAR 2008 PLANNING CALENDAR**

**2006**

Oct./Nov.	Preliminary Budget Planning
Nov./Dec.	Development of Budget Planning Factors (see attached)
November 6	Simon Year-End & Year-to-Date Budget Meeting
November 10	The College Year-End & Year-to-Date Budget Meeting
November 27	ESM Year-End & Year-to-Date Budget Meeting
December 31	FY07 Benefit Rates Submitted to Government for Approval

**2007**

January 8	Capital Budget Guidelines & Packages Distributed
January 8	Operating Budget Guidelines & Packages Distributed
January 15	ESM Preliminary Budget Meeting with President
January 16	Simon Preliminary Budget Meeting with President
January 17	Warner Preliminary Budget Meeting with President
January 22	The College Preliminary Budget Meeting with President
January 23	SMD & SON Preliminary Budget Meeting with President
February	Final Endowment Modeling based on December 31, 2006 Market Values
February 5	Central Admin. & Ledger 3 Department Capital Budget Submissions Due
February 9	Division Capital Budgets Submissions Due
February 12	Central Admin. & Ledger 3 Department Operating Budget Submissions Due
February 12 - 23	Review of Central & Ledger 3 Budgets & Budget Review Meetings
February 23	Tuition Recommendations Due
February 26	Preliminary Allocations Distributed to Divisions

Division		Central		Cost Centers*	
Operating	Capital	Operating	Capital	Operating	Capital
x	x	—	—	—	—
—	—	—	—	—	—
x	—	x	—	x	—
—	x	—	x	—	x
x	—	x	—	x	—
—	—	—	—	—	—
—	—	—	x	—	x
—	x	—	—	—	—
—	—	x	—	x	—
—	—	x	x	x	x
x	—	—	—	—	—
x	—	—	—	x	—

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		<b>Division</b>		<b>Central</b>		<b>Cost Centers*</b>	
		<u>Operating</u>	<u>Capital</u>	<u>Operating</u>	<u>Capital</u>	<u>Operating</u>	<u>Capital</u>
<b>March 8-9</b>	<b>Presentation to Board of Trustees of Proposed Tuition, Room and Board Increases for Approval</b>	x	—	—	—	—	—
March 12	Preliminary Division Budgets Submissions Due	x	—	—	—	—	—
March 26	Final Allocations Distributed to Divisions	x	—	—	—	x	—
April 3	FY08 Warner Budget Review Meeting @11:00a.m. FY08 College Budget Review Meeting @ 2:00 p.m.	x	—	—	—	—	—
April 4	FY08 SMD & SON Budget Review Meeting @ 11:00 a.m.						
April 5	FY08 ESM Budget Review Meeting @ 1:00 p.m. FY08 Simon Budget Review Meeting @ 2:00 p.m.						
April 9 - 20	Review of Division Budgets & Division Meetings with Budget Committee	x	x	—	—	—	—
April 13	5-Year Plan Submissions Due	x	—	—	—	—	—
<b>April 13</b>	<b>Draft Budget materials available on Financial Planning Committee Website</b>	x	x	x	x	x	x
<b>April 19 to 26 TBD</b>	<b>(Tentative) Review of Proposed Capital &amp; Operating Budgets by Financial Planning Committee</b>	x	x	x	x	x	x
<b>April 19</b>	<b>Review of Proposed Capital Budgets by Facilities Committee</b>	x	x	x	x	x	x
<b>April 26</b>	Review of Capital and Operating Budget by Faculty Budget Committee	x	x	x	x	x	x
April 30 at noon	Board of Trustees Budget Books to Printer for guaranteed delivery on Tuesday, May 2 at 5PM					—	—
May 2	Mailing Date for Board of Trustees Budget Information	—	—	—	—	—	—
<b>May 17 - 18</b>	<b>Approval of Proposed Capital &amp; Operating Budgets by Board of Trustees</b>	x	x	x	x	x	x
May 21	Cost Center Budgets and Rate Calculations Submissions Due	—	—	—	—	x	—
May 29	Budget Approval Letters Distributed	x	x	x	x	x	x
June 19 - 30	Detailed Operating Budget Submissions Due	x	—	x	—	x	—

\* **Auxiliary Operations, Residential Life, Conference & Events, Facilities, Information Technology  
Environmental Health and Safety, University Health Services**