

UA Strategy, Planning and Budget Calendar

(last updated 5-31-2024)

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Date	Responsible Party	Year	Action/Event	Audience	Operating Budget	Capital Budget	Performance	Personal Services	Notes
May - August	MAUs	FY26	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
May/June	President and senior leadership	FY25	-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	FY26	Distribute instructions regarding: Submitting Operating & Capital Budget Requests Updating the Long Range Capital Plan	MAUs	OBD Process	CBD Process			
June	UA Leadership	FY26	Budget, Goals, and Measures Planning Discussion	BOR	Yes		Yes		
June - 18th	MAUs	FY25	Initial budget entries due	SO SPB	Yes				
June - 24th	SO SPB	FY25	Initial budget entries to Finance	SO Finance	Yes				
June - 24th	SO SPB	FY25	Initial position budget entries to HR	SO HR	Yes				
June 24th - July 1st	SO HR	FY25	-No position data entry (NBAPOS/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 - 28th	SO Finance	FY25	Temporary unrestricted budgets reversed and permanent budgets loaded	MAUs	Yes				Scroll to Year End Instructions
July 1st		All	Fiscal year begins	UA	Yes		Yes	Yes	
July	SO SPB	FY26	Compensation and fixed cost budget estimates developed	MAUs	Yes			Yes	

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July	DoF	FY25	New Capital Appropriation Collocation Codes Created/Distributed	SO SPB		CAT Process			
July	SO SPB	FY25	New Collocation Codes set up in Banner	MAUs		CAT Process			
As Needed	MAUs	All	Funds Attached to Collocation Codes	SO SPB		CAT Process			
July	SO SPB	FY26	Instructions for completing ABS narrative sections issued	MAUs	Yes				
July - 19th	MAUs	FY24	Final Authorized: balance budget and Expenditures in Banner (allocation, object code, and fund source) prior to SO Finance roll	SO SPB	Yes				
July - 20th	SO Finance	FY24	Fiscal year roll in Banner	UA	Yes				
July - 24th	MAUs	FY25	Management Plan: balanced operating budget in Banner (allocation, object code, and fund source)	SO SPB	Yes				
August 1st	SO SPB	FY25	Management Plan Budget, (including personal services report) Scenario	OMB	Yes			Yes	
August 1st	MAUs	FY26	Submitted: Operating Budget Requests Capital Budget Requests Long Range Capital Plan DM/R&R Backlog	SO SPB	OBD Process	CBD Process			
August	MAUs	FY25	Deferred Maintenance Expenditure Projections Submitted	SO SPB		CAT Process			
August	SO SPB	FY26	10-yr Revenue Projections	OMB					
August	MAUs	FY26	Universities Budget Meeting	UA Leadership	Yes				

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August	Chancellors	FY26	Review and Provide input: Operating and Capital Budget Requests	President and senior leadership	OBD Process	CBD Process			
August (end of month)	MAUs	FY26	Initial performance analyses published by MAUs on OMB web site for public viewing, and used by UA Leadership in discussion during initial meetings with OMB.	OMB			PME Process		Designated coordinating point person assigned for UAA, UAF, UAS, SO, EE & UA reports
September - November	MAUs	FY26	Final MAU performance reports entered, including written analysis, definitions, baseline data, in alignment with the overall budget. Note: Content changes made later in this period typically undergo review, and may require OMB approval to publish.	UA Leadership			PME Process		Designated coordinating point person assigned for UAA, UAF, UAS, SO, EE & UA reports
September (early)	SO SPB	FY26	Deferred Maintenance/Renewal & Repurposing Backlog submitted	OMB		CBD Process			
September	SO SPB	FY25	Deferred Maintenance Expenditure Projections Submitted	OMB		CAT Process			
September	UA Leadership	AY26	Discussion and Approval of Tuition Rates	BOR	Yes				
Aug/Sept	SO SPB	FY26	Review: Operating Budget Request Capital Budget Request Long Range Capital Plan	BOR	OBD Process	CBD Process			
September	SO SPB	FY24	Final Authorized and Actual Scenarios due in ABS	OMB	Yes				
September	UA Leadership	FY26	Initial Meetings with Legislative Finance Division	Leg. Fin.	OBD Process				

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September	UA Leadership	FY26	Initial Meetings with OMB	OMB	OBD Process				
September	SO SPB	FY25	Capital Appropriation History Updated	UA		CAT Process			
September (late)	SO SPB	FY25	Authorized Budget Distribution Document (Yellowbook) Published	UA					
October	MAUs	FY26	Complete MAU Level Operating Budget Narratives & Org Charts for ABS	SO SPB	Yes				
October (late)	SO SPB	FY26	UA Level Narrative Submitted	OMB	Yes				
November (early)	UA Leadership	FY26	Approval: Operating Budget Request Capital Budget Request Second Review: Long Range Capital Plan	BOR	OBD Process	CBD Process			
November (early)	SO Finance	FY24	Financial Statements Audited Financial Statements Available	BOR					
November	SO SPB	FY26	MAU Level Operating Budget Narratives & Org Charts in ABS	OMB	Yes				
November	SO SPB	FY26	Submitted: Operating Budget Capital Budget	OMB	OBD Process	CBD Process			

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November (end of month)	MAUs	FY26	Final MAU performance analysis published via OMB action on website for public viewing and locked until next cycle.	OMB			PME Process		Hard stop due date set by SO SPB, as select content is included in both UA Budget book and Governor's Budget Proposal. In recent years, this has occurred in early December.
December	SO SPB	FY26	Due: Gov/UA Budget Book NOTE: Once this is submitted, OMB will not allow changes to published performance analysis content until the next reporting cycle.	OMB	Yes	Yes	Yes	Yes	
December 15th	Governor	FY26	Budget Proposal submitted to Legislature	Legislature	Yes	Yes			
December (late)	MAUs	FY25	Due: Capital Appropriation Status Updates (CASR)	SO SPB		CBD Process			
January (early)	SO SPB	FY25	Due: Capital Appropriations Status Reports (CASR)	OMB		CBD Process			
January (early)	SO SPB	FY25	Submit supplemental request(s) to OMB	OMB	Yes	Yes			
January (early)	SO SPB	FY26	Discuss possible budget amendments with OMB	OMB	Yes	Yes			
January	SO SPB	FY26	Operating and Capital Budget Document Published (aka Redbook)	UA	OBD Process	CBD Process	Yes		
January	Legislature	All	Legislative Session Begins 3rd Tuesday in January	State of Alaska	Yes				
Feb - March	UA Leadership	FY25	Supplemental Request Approval (if applicable)	BOR	Yes	Yes			

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Feb - March	UA Leadership	FY26	Amendment Request Approval (if applicable)	BOR	Yes	Yes			
Feb - March	UA Leadership	FY26	Budget Request - Legislative Status Report	BOR	Yes	Yes			
Feb - March	Governor	FY26	Amended budget scenario released	Legislature	Yes	Yes			
March (early)	MAUs	FY25	Lapsing Capital Appropriations Review/Extension Requests	SO SPB		CAT Process			
April (early)	MAUs	FY25	University Spring Management Report Review	UA Leadership	Yes	Yes			
April - 15th	UA Leadership	AY26	Tuition Rate Notice (letter from the President per BOR P05.10.060)	BOR					
April	UA Leadership	FY25	Budget Request - Legislative Status Report	BOR	Yes	Yes			
April - June	SO SPB	FY25	Lapsing Capital Appropriations Reviewed/Extended	DoF		CAT Process			
April	SO SPB	FY26	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	FY26	Leg: Budget submitted to Governor for signature and veto review Gov: Operating and capital bills are signed	Governor	Yes	Yes			
May	SO DAIR	FY27	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	FY26	Temporary budgets rolled in Banner	MAUs	Yes				Link to Finance year end calendar