

Email From: Cole, Carol
Sent: Thursday, November 12, 2009 10:41 AM
Subject: 2009-10 Midyear Budget Review Calendar

Below is the calendar of events for the midyear budget review process. 2009-10 Midyear Budget Worksheets will be mailed to Budget Managers/Authorized Signers by December 14 – please watch for them (copies are not retained).

Three copies of completed and approved midyear documents are to be returned to me by January 11, 2010. Consistent with past practice, the *Budget Worksheet* is to be used to indicate requested budget changes resulting from normal operations (e.g., cost changes). In contrast, *Special Funding Requests* are to be used for items that are “new and different” and that are not currently budgeted.

To assist with planning for the upcoming year, we are also soliciting major Special Funding Requests for possible funding in 2010-11. Please use the attached Special Funding Request form to request 2010-11 funding for new projects or programs estimated to cost \$20,000 or more. The same form can be used for 2009-10 requests of any amount.

2009-10 Midyear Budget Review Process Calendar	
Policy guidelines are issued along with <i>Midyear Budget Worksheets</i> (reflecting budget status and annual expenditure data through November)	December 14
Due date for budget managers to submit completed <i>Midyear Budget Worksheets</i> and <i>Special Funding Requests</i> —that have been reviewed and approved by the respective Senior Manager—to Carol Cole (three copies)	January 11
Midyear Budget Hearings	January 19-21
Reproduction deadline for reports to the Board of Directors Finance Committee	February 3
Board of Directors Finance Committee meeting to review midyear budget	February 16
Board of Directors meeting to review and approve midyear budget	March 5

This information, related forms, and the schedule of department’s hearings can be found here:

<http://www.uchastings.edu/budget/budget-process-forms.html>

A review and analysis of budgets and account activity can be performed at any time, and in advance of receiving Budget Worksheets, by using the Fiscal Information Reporting System (WebAdvisor) accessed here:

<http://www.uchastings.edu/fiscal/fiscal-reporting.html>

If you have any questions, please do not hesitate to contact me.

Thanks,
--Carol

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