



Important Dates - Budget, Planning & Finance

Month	Dates	Description of Activities
May^		<ul style="list-style-type: none"> Email from Budget, Planning & Finance Financial Officer with Funding Summary (Documents to be sent via email and meeting is optional)
May^	28th-31st	<ul style="list-style-type: none"> PTR point results to Budget, Planning & Finance (as per notice from Dean's Office). Dean's Excellence/Small Group award nominations are due to Dean's Office.
June^	20-Jun	<ul style="list-style-type: none"> Final PTR/Merit award distribution and histograms (to include Excellence/Small Group allocations and Chair's decisions) circulated to departments by Business Services. Chairs to notify faculty members of their performance assessments and PTR/Merit decisions/awards prior to July 1st.
July^	11th 31st	<ul style="list-style-type: none"> Departments to provide Dean's Office with PTR letter and CVs for all continuing faculty. Final Deadline for Carryforward Overage Plan Submission to the Dean's Office
August^	5th *	<ul style="list-style-type: none"> Sessional Lecturer funding request to Budget, Planning & Finance. Forecast as at July 31 - Operating and Summer Accounts - due to Budget, Planning & Finance.
September^		
October^		
November^	* 25th 30th	<ul style="list-style-type: none"> Forecast as at October 31 -Operating and TA Accounts - due to Budget, Planning & Finance. Payroll errors and corrections sent to HR before December pay close. Deadline to submit new or updated TA rationale forms for review for the following fiscal year- process in the link below: LINK to TA rationale form guidance
December^		<ul style="list-style-type: none"> Receive communication re next year budget discussion meeting with Budget, Planning & Finance.
January^	22nd Jan - 28th Feb 29th Jan - 23rd Feb	<ul style="list-style-type: none"> Receive communication re next year budget discussion meeting with Budget, Planning & Finance. Draft budgets distributed to Business Officer & Chair by Budget, Planning & Finance, feedback to Budget, Planning & Finance within 8 business days of distribution. Schedule budget meeting with Chair/Admin co-ord/Business Officer/Financial Officer and BP&F as necessary.
February^	* 22nd Jan - 28th Feb 29th Jan - 23rd Feb	<ul style="list-style-type: none"> Forecast as at January 31 - Operating and TA Accounts - due to Budget, Planning & Finance. Schedule budget meeting with Chair/Admin co-ord/Business Officer/Financial Officer and Assistant Director, Academic Financial Operations. Draft budgets distributed to Business Officer & Chair by Budget, Planning & Finance, feedback to Budget, Planning & Finance prior to meeting for Department review
April^	11th 24th Apr -3rd May	<ul style="list-style-type: none"> Advertising and Search Cost Recovery request to the Dean's Office- VD Faculty Receive next Fiscal Year Base Budget Files.

Notes* - ^

1. Departments are strongly encouraged to submit the forecast by the 7th working day from month-end
2. The deadline to submit all forecasts is 10 business days following the month-end
3. Business Officers with more than one department or other budgets to oversee are strongly encouraged to submit each forecast as they complete it, instead of submitting them all on the last day

Timeline uncertain due to UTFA negotiations