View Services

$\mathcal{Q}$ Start typing your question, or search with keywords

Submit a Budget Initiative Request

Budget Assist

Budget Assist, the university's Mission focused, standardized budget request platform, will be open for fiscal year 2026 initiatives starting Tuesday, October 1, 2024. For both new and contractual budget initiatives, users provide a set of qualitative inputs and budgets. The Office of Planning and Budget welcomes FY26 Budget Assist Proposals in the following categories:

- Proposals classified as Existing Contract Increase (ECI) requests.
- Proposals classified as Non-Discretionary Increase (NDI) requests.
- Discretionary initiatives (see criteria below).

The President's Cabinet will evaluate discretionary proposals using the following criteria:

- Health and safety
- Campus and cyber security
- Revenue generation
- Essential student need

The submission window for requests will continue until the end of business on Friday, November 8, 2024.

Once requests are reviewed for completeness, they will be forwarded to their respective unit and division leaders for electronic approval. The University's Cabinet will consider all division-approved requests for funding.

Please contact Michael Harrington, harrington@usfca.edu with any questions.

With each change in a Request's status, notification emails will be sent to unit contacts, as well as the Request's sponsor.

If desired, supporting files can be uploaded and attached to a Request using the paperclip icon at the top right corner of the form.
If provided, please make reference to any attachments within the Initiative Description field below.

Once complete, please click on Submit to forward your request to the Office of Planning and Budget. Please note after hitting Submit, a dialog box will ask if you wish to Leave site? You want to click Leave.

You are welcome to work on your request offline, then copy and paste your work into the submission form

Thank you.

Link to: USF 2027 Strategic Plan
Link to: Offline Submission Form
Link to: Budget Development Timeline

* Enter Initiative Name ❓

Enter a name for your Initiative Budget Request (up to 100 characters). ✖

* Select Primary Strategic Goal ❓

Select your Primary Strategic Priority from the choice list. ✖

Reimagine Jesuit Education

* Enter Brief Initiative Description ❓

In a few sentences, please describe how this initiative supports the specific strategic priority identified above. ✖

Select your Primary Unit

-- None --

Enter Primary Contact for this Initiative (if not yourself) ❓

Enter the primary contact's USFconnect username or USF email name. As you type the application will begin to match names in the user list. ✖

* Select Initiative Type ❓

Capital Project – an expense request in support of a large-dollar plan or
project which involves acquisition or construction of capital assets, e.g.
buildings; typically, such projects make use of restricted university
funds, e.g. funds available through debt proceeds, designated gifts, and/or
grants.   ✖

Enrollment Related – an expense request supporting the expansion of student
enrollment or instructional capabilities, e.g. recruitment, online
instruction delivery training, etc.

Existing Contract Increase – an expense request based upon previous
university agreements with associated levels of required financial support,
e.g. employee compensation increases, utilities, leases, service
agreements, software licenses, etc.

New Academic Program – an expense request supporting a new academic program
offering. Budgets here would follow from a detailed description which
includes a market assessment and curriculum; as well as, a New and
Continuing Academic Program (NCAP) Workbook which outlines enrollment
projections, tuition, financial aid, required instructional and support
resources.

Discretionary Increase – an expense request supporting a new or
expanded university resource or service which does not generate student
credit hours, e.g. annual license for a new software, university website
redesign, new or expanded student service, etc.

Non-Discretionary Increase – an expense request supporting increased
expense in providing a required existing service, good, or operating budget
which is not governed by a contractual obligation, e.g. the university's
target operating reserve, ITS hardware/service/maintenance costs, etc.

True-Up (Match to Current Actual) – an expense or revenue adjustment
requested to bring an operating activity's budget closer to recent actual
activity, e.g. application fees, university compensation salvage, etc.

Capital Project

* Enter the Finance Organization Code (6 numbers)

* Select Request Budget Type ❓

| Base - Continuing budget request   ▲   ✖ |
| One-Time - Single fiscal year budget request ▼ |

-- None --

* What budget reallocations will you make to partially self-fund this initiative? Please include dollar amounts. ❓

Any dollar amounts provided here are in addition to requested amounts following.   ✖

Note: Fiscal year box must be checked in order for entered budget values to be saved.

☐ Does your Initiative Extend to Fiscal Year 2025?

☐ Does your Initiative Extend to Fiscal Year 2026?

Funding Details - Fiscal Year 2026

Revenue

513010 - Tuition - FY26

515090 - Fees - FY26

520090 - Grants & Contracts - FY26

530010 - Gifts - FY26

589010 - Auxiliary Revenue - FY26 ❓

590010 - Other Revenue - FY26 ❓

Compensation ❓

Please include salary budgets only here - associated benefits will be calculated separately at their respective rates.
Should a desired full-time staff finance account code not be available, you can enter one and its budget in this section's bottom two fields. ✖

610010 - Full-Time Faculty - FY26

620010 - Part-Time Faculty - FY26

650020 - Full-Time Exempt Staff - FY26

670010 - Part-Time Staff - FY26

660010 - Full-Time OPE Staff - FY26

680000 - Student Staff - FY26

Other Full-Time Staff - Finance Account (6 numbers) - FY26

Other Full-Time Staff - FY26

Full-Time Staffing Details ❓

For full-time categories, in the first field enter the number of full-time position(s), then in the second field enter their title(s). ✖

Full-Time Faculty FTE FY26

Full-Time Exempt Staff FTE FY26

Full-Time OPE Staff FTE FY26

Full-Time Other Staff FTE FY26

Full-Time Faculty Notes FY26

Full-Time Exempt Staff Notes FY26

Full-Time OPE Staff Notes FY26

Full-Time Other Staff Notes FY26

Other Expenditures ❓

Please enter dollar budget amounts for the initiative's Other Expenditures by account. Should a desired finance account code not be available, you can enter one and its budget in this section's last two fields. ✖

700000 - General Operating - FY26

[   ]

731010 - Scholarship - FY26

[   ]

740000 - Facilities Expenses - FY26

[   ]

760010 - Insurance - FY26

[   ]

780010 - Debt Service - FY26

[   ]

790000 - Capital - FY26

[   ]

799910 - Reserves - FY26

[   ]

Other Expenditure - Finance Account (6 numbers) - FY26

[   ]

Other Expenditure - Amount - FY26

[   ]

☐   Does your Initiative Extend to Fiscal Year 2027?

Initiative Support ❓

| To assist with the initiative approval process, please provide short answers to the following questions regarding your request. | ✖ |

* Relative to other proposals submitted by your unit or division, how does this proposal rank?

[   ]

* Are there ongoing maintenance or other costs associated with this budget request?

[   ]

* Explain how this proposed initiative will eliminate a redundancy, enhance capacity, or reduce future costs for the university.

[   ]

* Will this initiative produce revenue?

[-- None --   ]

* How does this initiative improve compliance, respond to a security obligation, or mitigate risk?

[   ]

* For which stakeholders, if any, will this initiative enhance satisfaction? How will satisfaction be enhanced for these stakeholders?

[   ]

* The University of San Francisco is a mission-driven institution. How does this initiative resonate with the institution's mission, vision, and values?

[   ]

* Please explain how you will measure the results of this initiative, i.e How will we know we are successful?

[   ]

If desired, supporting files can be uploaded and attached to a Request using the paperclip icon at the top right corner of the form. If provided, please make reference to within Initiative Description field above. Once complete, please click on Submit to forward your request to the Office of Planning and Budget. Please note after hitting Submit, a dialog box will ask if you wish to Leave site? You want to click Leave.

🖉 Add attachments

submit

Required information

Enter Initiative Name

Enter Brief Initiative Description

Enter the Finance Organization Code (6 ...