Budget Assist

Budget Assist, the university's Mission focused, standardized budget request platform, will be open for fiscal year 2022 initiatives beginning Thursday, October 1, 2020. For both new and contractual budget initiatives, users provide a set of qualitative inputs and budgets. The submission window for budget requests will continue through the end of Friday, November 13, 2020. We are asking that contractual or non-discretionary requests be filed by Friday, October 30, 2020, so that that President's Cabinet can review these requests before the Thanksgiving break.

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, x2790, harrington@usfca.edu (mailto: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 within 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
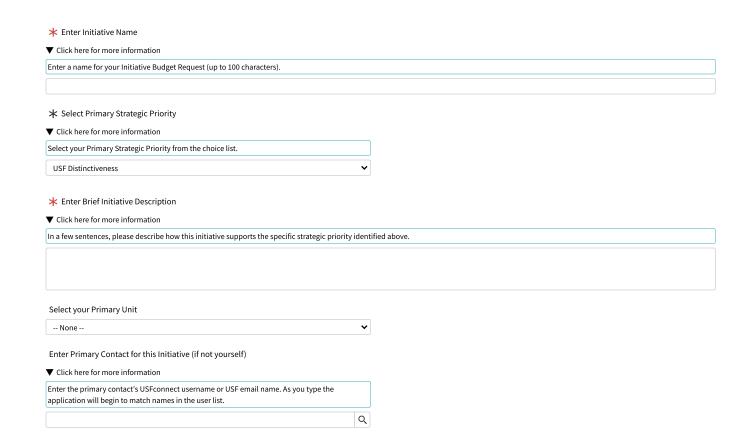
Thank you.

Link to: Offline Submission Form (https://myusf.usfca.edu/sites/default/files/users/jtang20/Budget_Assist_Request_Preparation_Document%2007-22-19.pdf)
Link to: Vision & Mission Statement (https://www.usfca.edu/about-usf/who-we-are/vision-mission)
Link to: Our Values (https://www.usfca.edu/about-usf/who-we-are/our-values)
Link to: Strategic Priorities (https://myusf.usfca.edu/president/strategic-priorities)
Link to: Budget Development Timeline (https://myusf.usfca.edu/planning-budget/budget-development-timeline)

✱ Enter Initiative Name

▼ Click here for more information

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

✱ Select Primary Strategic Priority

▼ Click here for more information

Select your Primary Strategic Priority from the choice list.

| USF Distinctiveness | ⌄ |

✱ Enter Brief Initiative Description

▼ Click here for more information

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)

▼ Click here for more information

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

▼ Click here for more information

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.

New Non-Academic Initiative – 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

▼ Click here for more information

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.

▼ Click here for more information

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 2021?

☑   Does your Initiative Extend to Fiscal Year 2022?

Funding Details - Fiscal Year 2022

Revenue

513010 - Tuition - FY22

_____

515090 - Fees - FY22

_____

520090 - Grants & Contracts - FY22

_____

530010 - Gifts - FY22

_____

589010 - Auxillary Revenue - FY22

▼ Click here for more information

Includes revenues relating to student housing, parking, athletic facility charges, tickets, concessions and space rental.

_____

590010 - Other Revenue - FY22

▼ Click here for more information

Includes revenues relating to executive education, advancement and special events, copiers and printing, rental income, royalties and commissions.

_____

Compensation

▼ Click here for more information

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 - FY22

_____

620010 - Part-Time Faculty - FY22

_____

650020 - Full-Time Exempt Staff - FY22

_____

670010 - Part-Time Staff - FY22

_____

660010 - Full-Time OPE Staff - FY22

_____

680000 - Student Staff - FY22

_____

Other Full-Time Staff - Finance Account (6 numbers) - FY22

_____

Other Full-Time Staff - FY22

_____

Full-Time Staffing Details

▼ Click here for more information

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 FY22

[   ]

Full-Time Exempt Staff FTE FY22

[   ]

Full-Time OPE Staff FTE FY22

[   ]

Full-Time Other Staff FTE FY22

[   ]

Full-Time Faculty Notes FY22

[   ]

Full-Time Exempt Staff Notes FY22

[   ]

Full-Time OPE Staff Notes FY22

[   ]

Full-Time Other Staff Notes FY22

[   ]

Other Expenditures

▼ Click here for more information

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 - FY22

[   ]

731010 - Scholarship - FY22

[   ]

740000 - Facilities Expenses - FY22

[   ]

760010 - Insurance - FY22

[   ]

780010 - Debt Service - FY22

[   ]

790000 - Capital - FY22

[   ]

799910 - Reserves - FY22

[   ]

Other Expenditure - Finance Account (6 numbers) - FY22

[   ]

Other Expenditure - Amount - FY22

[   ]

[ ] Does your Initiative Extend to Fiscal Year 2023?

Initiative Support

▼ Click here for more information

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?

[ ]

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Response time(ms): 1647, network: 3, server: 1485, browser: 159.