General Instructions – In the workbook each initiative request should have a separate tab worksheet by priority. Ex: Init Req 1, Init Req 2, Init Req 3.

1) Department: Insert department name

2) Program: Insert specific programs (Ex: BAAS, Admissions)

3) University goal to be advanced:
   a. National Competitiveness – competing on a national/regional level with other universities
   b. Student Access and Success – links to student success
   c. Infrastructure and Administration – operation, administration, facilities
   d. Community Advancement – public service

4) Description: Provide description of initiative. The description of individual initiatives must be clear and concise. Specify if new, expanded or sustaining.

5) Total Initiative Costs: These totals will come from page 2 New Initiative Costs section. (For cost purposes the bottom section of the spreadsheet cost should be calculated first to determine the total initiative cost.)
   a. Recurring Costs – base items which will be included in future year budgets
   b. One-Time Costs – one-time cost for proposed fiscal year; not recurring

6) Proposed Funding Sources: Suggested funding source for initiative
   a. Enrollment Growth – enrollment increase, university-wide tuition and fees increase
   b. Fund Equity – carried-forward balances from previous fiscal year (not suggested to fund full-time positions)
   c. Reallocation/Operating Efficiencies – reallocate existing budget for different purpose
   d. UHD Revenue – services, other resources of revenue

7) Existing Budget: Exists in current base budget/reallocation

8) New Revenue: New source of revenue funding (new program)

9) UHD Central Funding: General funds to the university, state appropriation, tuition, and centrally managed fees

10) Space Usage: Identify space requirements and usage (if needed)

11) New Personnel: Provide explanation and purpose for new personnel

12) FTE: Select Faculty or Staff and number of positions requested (same area and/or discipline)

13) Anticipated Outcome: Must relate to the Progress Card measures and/or UHD Strategic Plan 2020

14) Faculty Salaries: List proposed faculty salary based on CUPA/AAUP/AACSB report
   a. Faculty Benefits – use 27% full-time (fringe cost will populate based on salary cost)

15) Staff Salaries: List proposed staff salary based on UHD compensation table (ESO)
   a. Staff Benefits – change benefit calculation based on: 7.65% students, 13.5% temp/NE, 27% full-time (default)
   (fringe cost will populate based on salary cost)

16) Maintenance and Operation (M&O): General operating expenses (telephone, supplies, etc.)

17) Capital: HEAF type items and/or tagged property

18) Renovation/Relocation: HEAF type items for the purpose of renovation and/or relocation

19) Summer Support: based on faculty salary teaching 1 or 2 classes

20) Travel: based on travel needs for a position or general travel

21) Other Specify: funds to support new program(s) or start-up funds for a new position

22) Three Year Faculty Plan Tab: FY16 Initial request cost will populate. Update with department, description, program and FTE. Provide proposed for FY17/FY18 faculty search information in the highlighted sections.
Planning and Budget Forms

- **Fiscal Year 2016 Initiative Request**: This form is to be completed for each proposed initiative.
- **Three-Year All Funds Budget**: On this form, plan faculty hiring for the next three years - FY2016; FY 2017; FY 2018.
- **Total Budget Summary**: On this form, complete the unit’s budgets and actuals for FY2014 and FY2015 (Oct.) and FY2016 (proposed) to be presented at the college/unit meetings.

Submission and Review of Plans

The College plans are due in the Provost’s Office by February 13, 2015. Dr. Faiza Khoja and Elaine Pearson will work with you and your staff according to the Planning and Budget Development calendar.