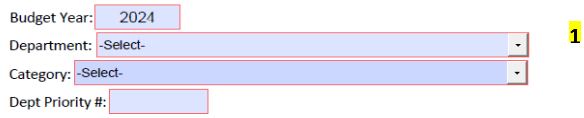
University of Houston Clear Lake
Planning and Budget

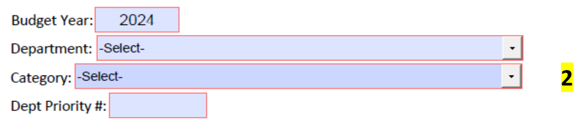
Budget Initiative Request Form

Helpful tip: Save each budget initiative request with a user-friendly identifiable filename.
Examples: DeptName_Priority1; DeptName_priority#only; DeptName_priority#only_currentdate

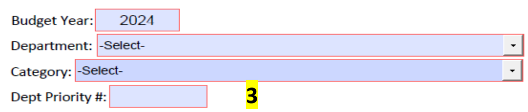
Step 1.
On the top left of the form, select your Department.



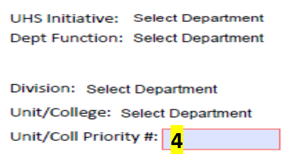
Step 2.
Using the drop-down menu, select the Category that closely describes your initiative. Use your best judgment.
If none, select "other."



Step 3.
Provide your Department Priority number for the initiative.

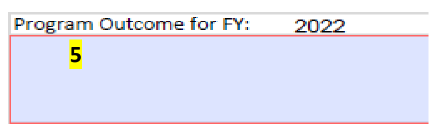


Step 4.
(For Unit/College Head review only).
On the top bottom right of the form, provide your Unit/College Priority number.

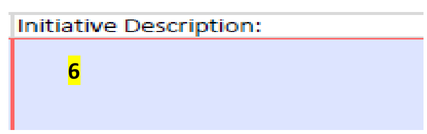


NOTE: Only **ONE** budget initiative request per Program Outcome. If your budget initiative encompasses more than one program outcome, please chose the primary program outcome. You may mention the others within your request, however, it is not required.

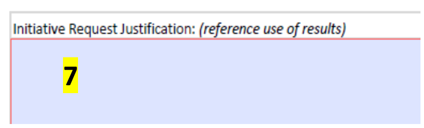
Step 5.
Provide one Program Outcome for the Fiscal Year.



Step 6.
Share your Initiative Description. Be sure to include all of your important details and provide clarification, if necessary.

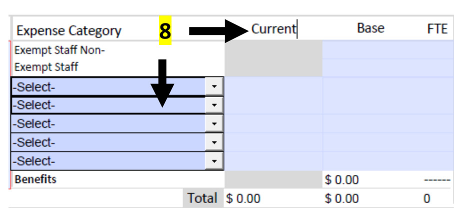


Step 7.
For the justification, refer to your criteria for success for context assistance. Be specific.



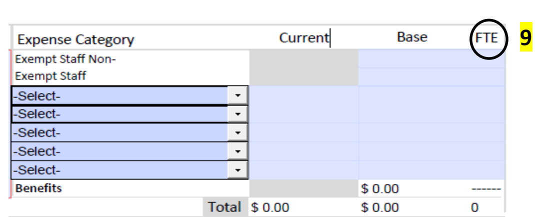
Step 8.
Provide all of your projected expenses associated with your initiative.

Expense Categories have been provided to help itemize your budget request and to also provide increased transparency and improved access to information during the review process. These are NOT budget accounts. For Exempt and Non-Exempt staff, use base salary totals only. Benefits will auto-calculate upon entry.



NOTE: For Exempt and Non-Exempt Staff budget requests, the amount entered will be the total sum of FTE base salaries for each staff category. Example: If the request description is for 3 Exempt Staff FTE with different titles (or the same, it doesn't matter), you will sum the base annual salary for all 3 FTEs and enter in the amount field for Exempt Staff.

Step 9.
Indicate the Full-Time Equivalency (FTE) for Exempt, Non-Exempt, Student Employees, and Graduate Assistants.



Step 10. Provide the potential impact if your initiative is not funded. Refer to your use of results for context assistance.	Impact if Not Funded: *(reference criteria for success)* **10**
Step 11a. Pick the College or Division related to your Tier 2 initiative. ***Step 11b.*** Then, select your Tier 2 Objectives.	TIER 2 Objectives -Select- **11a** -Select- **11b**
Step 12. If this is a new FTE request, click on the button labeled JAQ FORM, at the bottom right of the form. This will provide you with direct access to the form to begin this process with Human Resources.	**JAQ FORM** **12**
Step 13. Click on the Acknowledgment box.	**13** Acknowledgment: ☐ by checking this box you understand all final requests submitted are to be included in future year assessment reports.
Step 14. In order to for the Budget Initiative request to be submitted to your Division head, the Unit/College head must enter their name in the space provided to confirm official review and approval.	Unit/College Head Approval: Enter Name **14**
Step 15. Once you have saved and completed the Budget Initiative form, place the completed form in the Budget Initiatives Request folder for your office, which is located in your division's TEAMS channel. (***Note***: Access to your respective TEAMS folder is granted by your Business Administrator.)	***a. Click on your division folder. (ex. Academic Affairs)*** Planning & Budget ··· General **15a** Academic Affairs Administration and Finance Institutional Strategy Pearland Campus Admin Name Budget Initiatives Requests Current Year Budget Reports ***b. Then, select the folder for your office. (ex. C0061 – Office of Sr. VP & Provost)*** Planning & Budget ··· General Academic Affairs Administration and Finance Academic Affairs > **Budget Initiatives Requests** Name C0012 - Environmental Institute of Houston **15b** C0061 - Office of Sr. VP & Provost