

# Budget Request Submission Guidelines

2019 2020



November 2018

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# 1 Purpose

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To describe the formalized process by which Divisions can request additional financial support. This form is designed to receive requests for funding less than \$200,000. Requests for funding greater than \$200,000 will be required to complete the Budget Request Form, as well as an additional Budget Request Rationale Submission. If the Request is for personnel, it is highly recommended to provide good rationale in the space provided in the description section.

## 2 Completing the Budget Request Form

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A Budget Request form will be required for each individual Request for funding. For example, a Request for personnel and an unrelated operating support would require two forms, while a related and robust Request that has One-Time, Personnel and Operating components should be submitted on one form.

These separate Budget Requests must be prioritized. At the top of each Budget Request Form, there is an input box that allows you to indicate the level of priority of the Budget Request, 1 being the highest priority.

There are three input sections of the Budget Request Form:

- I. Header
- II. Request
- III. Approval Log

### 2.1 Header

The Header of the Budget Request Form asks for general information about the funding requested.

At the highest level of reporting, the Division is **required** for the Budget Request while the Sub-Division and/or Department are optional. These fields are populated by drop-down lists. Please make sure to select from these lists.

Please indicate a contact. In most cases, this would be the individual who is completing the form. This individual may be contacted to clarify or provide more information surrounding the Budget Request Form during the Approval Process.

Each Budget Request should have a unique identifying title.

For Budget Requests less than \$200,000, a description outlining the reason for the Budget Request is required.

For Budget Requests greater than \$200,000, refer to Section 3 below for more instructions.

Finally, indicate the first fiscal year of the funding Request.

## 2.2 Request

The Request section identifies broad categories where additional funding is required:

- Personnel
- Operating
- Other (please specify); or
- One-Time

Figures should be entered in the Budget Request Form in thousands of dollars in the year that the Budget is being requested.

## 2.3 Approval Log

All Budget Requests must be submitted through the office of the College Dean or Divisional Director. After approval at this level, submissions will be sent via email to the Budget and Financial Planning Office ([budget@uoguelph.ca](mailto:budget@uoguelph.ca)).

Final Approval occurs once all factors have been reviewed and taken into consideration.

Once the Budget Request has completed the Approval Process, the Budget Request will be returned to the College Dean/Divisional Director for distribution to the appropriate individuals.

# 3 Budget Request Rationale

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For Budget Requests greater than \$200,000, an additional Budget Request Rationale must be submitted.

The Budget Request Form does not provide a specific template for the Budget Request Rationale. Submitters may use any format they wish, however, the Budget Request Rationale ***must*** include:

- How the Budget Request aligns with the University of Guelph Mission
- 1-3 points rationalizing the budgetary need
- Key metrics supporting the Request\*
- Organization Chart (optional/if applicable)

The Budget Request Rationale should not exceed three (3) pages total.

\*For further guidelines as to the use of quantitative information and Appendices for the Budget Request, please see the [Budget Submission Supplemental](#) document.

## 4 Budget Request Deadlines

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The majority of Budget Request submissions will come through at the same time as the Budget Plan Submissions in Mid-February. An assessment and strength of the request will be weighed against an alignment to institutional and the planning unit's strategic agenda, the urgency of the activity and the affordability of the initiative. Both qualitative and quantitative details will dictate the assessment.

The use of the Budget Request Form will be required for any in-year urgent requests.