

SCHEV Organizational Change Budget Forms

Institutions are to submit a budget form for new and reorganized academic units and off-campus sites. The budget form is a part of the Resources/Budget section and should be placed at the end of the section.

Note. The margins for each of the budget forms have been reduced to ensure the form fits on one page. When copying and pasting into a Word document, the margins of the page on which the budget form will be placed must be customized to ensure the budget form fits on one page. The margins are customized **only** for the page on which the budget form is placed. The orientation of the page may need to change from portrait to landscape to ensure the budget form fits on the page. The budget form should be pasted as an Excel Object, which allows for editing while in the Word document. Adjustments to scale size will be necessary for some of the forms. All forms must maintain size for readability.

Instructions for Budget Forms

- Round all values to the nearest whole number.
- Unit names are indicated in the yellow spaces. When a unit name is too long for a cell in the form, use abbreviations for the words or for the unit's name. In the proposal document, indicate the unit's full name in the narrative and in the text for the appendix reference. For off-campus sites, if the site will not have a name, leave the yellow space blank.
- Indicate the position title for administrative personnel described in the proposal document. If the number of administrative positions exceeds the available spaces in the budget form, in the last "Position Title" cell on the form indicate "All Other Personnel" and provide the total salaries and total benefits for all other personnel noted in the proposal document.
Note. A detailed description should be included in the proposal document and should include: the position title, primary duties, salary, and fringe benefits (if applicable) for all administrative positions and proposed new hires.
- The "faculty" line item is the total of all faculty. If the academic unit/site will have a separate line item for other faculty categories (e.g., adjunct, term, contract, part-time), information should be provided under the "Faculty" heading in the proposal document. Include a sub-heading, a detailed explanation, and the budget amount for each category.
- The "other costs" line item is the total of all other expenses not previously indicated. In the Resources/Budget section, under a sub-heading entitled "Other Costs" provide the name of the expense, the year(s) for cost, the dollar amount (per year, if applicable), and a detailed explanation of the expense. Expenses should be presented separately.
- Footnotes cannot be added to the SCHEV budget form. Specific information about dollar amounts should be explained under the appropriate sub-heading in the proposal document.

See the SCHEV policy **ORGANIZATIONAL CHANGES AT PUBLIC INSTITUTIONS: POLICIES AND PROCEDURES FOR INTERNAL AND OFF-CAMPUS ORGANIZATIONAL CHANGES** for instructions and requirements <https://schev.edu/docs/default-source/institution-section/guidancepolicy/policies-and-guidelines/2021-organizational-change-policy.pdf>