INTEGRATED PLANNING

NEW RESOURCE REQUEST INFORMATION

IMPORTANT: TALK TO YOUR SUPERVISOR BEFORE REQUESTING NEW BUDGET ITEMS OR SUPPORT FROM OTHER AREAS

- Discuss your budget ideas with your supervisor **before** requesting estimates for capital, equipment, or technology.
- Talk to your supervisor **before** reaching out to other departments for help with your goal.
- If anything is unclear, your supervisor is your **first stop** for feedback and guidance.

CHOOSING THE RIGHT REQUEST TYPE

NEW BUDGET REQUEST CATEGORIES Each new budget request must be placed into one of the official resource categories below.	
Request Type	**What It Covers**
Capital	Construction or renovation of physical spaces (e.g., classroom remodels, new office space, adding power outlets to an office or classroom).
Equipment	Tangible property costing $1,000 or more (e.g., lab equipment, instructional tools).
Technology	Information technology hardware or software (e.g., computers, licenses, adding computer connections to an office or classroom).
Personnel	New full-time faculty or staff positions.
One-Time Operational Budget Increase	Temporary, substantial funding needs not categorized elsewhere (e.g., community event, promotional materials).
Ongoing Operational Budget Expansion	Increases to recurring budget lines (e.g., professional development, travel, marketing materials).
Perkins/Enhancement Grant	Equipment that may qualify for external grant funding.

REQUESTING A COST ESTIMATE

- Before you request a cost estimate:
  - You **must** talk with your supervisor and receive their "general blessing" **before** requesting any cost estimates or involving other departments.
  - Your supervisor is your go-to for guidance on any questions, or unique, unclear, or unexpected situations.

**The last date to submit all cost estimate requests is Friday, September 26, 2025.
This is the deadline for estimate requests—not for entering your plan into Diamond.**

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STEPS FOR REQUESTING COST ESTIMATES Follow the steps below to request a cost estimate for your new budget request.	
Request Type	**Cost Estimate Steps**
Capital	• Talk with your supervisor and get their "general blessing" before submitting a cost estimate request. • Submit the cost estimate request through the **maintenance work order system**. (click here for information on submitting a maintenance work order). • Refer to the **Submitting a Request for a Cost Estimate** guide for more details.
Equipment or Perkins/Enhancement Grant	• Talk with your supervisor and get their "general blessing" before submitting a cost estimate request. • If you already have a vendor relationship, you may request a quote on your own. • If not, or if you have questions, submit a request through the **maintenance work order system**. • If the equipment impacts facilities, requires installation, or connects multiple pieces, you must also submit a cost estimate request through the **maintenance work order system**.
Technology	• Talk with your supervisor and get their "general blessing" before submitting a cost estimate request. • Refer to the **New Technology Requests FAQ** for more information. • Email **helpdesk@otc.edu** to work with Information Technology on the estimate and any next steps.
Personnel	• Talk with your supervisor for direction on how they would like you to proceed.
One-Time or Operational Budget Increase	• One-Time or Operational Budget Increases • Work with your supervisor to define what you need. • Obtain a quote on your own, if possible. • Refer to the **FAQ for One-Time Operational Budget Requests** for more information. • Note – for Marketing and Communications requests, talk with your supervisor and get their "general blessing" to before submitting a **Marketing & Communication Requests Form** for next steps.
For More Detailed Guidance, refer to the New Resource Request - Next Steps Guide	

NEW RESOURCE REQUEST INFORMATION

KEY QUESTIONS EVERY NEW BUDGET REQUEST MUST ANSWER

- Every new budget request must include specific information so it can be fully reviewed and considered for funding. Make sure you clearly answer the following questions in your request.
  - What to Include in Your New Budget Request Justification:
  - What you are requesting: Be specific about the item, resource, or position.
  - Why it is needed: Explain how it supports your program/department's goals or student success.
  - Estimated cost: Provide the total cost based on your cost estimate or vendor quote.
  - Ongoing costs: Will this require ongoing funding (e.g., maintenance, subscriptions, staffing)?
  - Priority level: How important is this to your program (e.g., essential vs. enhancement)?
  - Facility impact: Does this affect utilities, space, or accessibility (e.g., electrical needs, ADA compliance)?