



New Fund/Organization Setup Request

Section 1 - New Request Type			
		Fund	Organization

Budget Office Only	
Fund:	_____
Organization:	_____

Section 2 - Request Information	
Fund/Organization Title:	_____
Responsible Person:	_____
Home Department:	_____
Purpose of Request:	_____
Budget Transfer Initiator:	_____
Requisition/Non-PO/DCA Initiator:	_____
Requisition/Non-PO/DCA Approver:	_____
Concur Approver*:	_____
Catering Approver:	_____
P-Card Approver:	_____
Begin Date:	_____
End Date:	_____
Source of Funds:	_____
(Negotiated/Approved Indirect Cost Rate on all Programs is 8% unless an approved appeal justification is submitted with this form.)	

Accounting Services Only		
Program Code:	Fund Type:	Predecessor Fund:
_____	_____	_____

Section 3 - Approvals	
Department/Program Director:	Date: _____
Divisional Vice-President:	Date: _____
Budget Office:	Date: _____
Accounting Services:	Date: _____

* Even if there is no travel planned at the moment, please ensure a Concur approver is listed to avoid any approval delays later if/when a travel request is processed.

If the travel approver needs to be updated after the submission of this form, please submit a new Cost Object Approver Update Request.

ESTABLISHING ACCOUNTS

If it is determined that changes to the attributes of an existing account need to be made, or a new cost center needs to be established because a department is expanding or adding a new program, a “**New Fund/Organization Setup Request**” form must be completed by the department.

The department must include the proposed title, fiscal agent, department, division, source of funds, approvers, a brief description of the program and the period the program will be active. If the program is not supported by State-appropriated funds, a budget should be attached identifying the source of revenue and the fee schedule used to determine the projected revenue.

Any division requesting the establishment of a University Institute or Center, must also submit a charter with the request. The charter should address the following:

- **Purpose and Goals:** Discuss the purpose of the unit, its goals, and the populations to be served. Goals should be stated in measurable terms where applicable.
- **Operational Activities:** What are the major activities that the unit will be involved in to accomplish its goals?
- **Relevancy:** Specify how the purposes and goals of the proposed unit support the mission of the University and/or the relevant College.
- **Benefits and Impact:** Discuss the proposed unit’s benefits and impact on the University’s faculty, students, staff, or community.
- **Staffing:** Describe the staffing needs of the unit, including the reporting structure.
- **Financial Expectations and Budget:** Include a detailed budget explaining the University and/or College role in the budget at the time of start-up and the expectations for becoming self-supporting. Any proposed distributions of net income from the account should be detailed.

The approval of an Institute may only be made by the University President.

After the forms have the appropriate approvals, they are submitted to the Budget Office for authorization and processing.

Please provide the supporting documentation relevant to the highlighted bullets listed above when submitting your request form to budget@rowan.edu. This is necessary for our review and approval process of this form. Thank you.