

Budget Revision Request Instructions

The below outlines the process for budget revisions. This procedure is in the process of being updated and agencies will be trained upon completion in the new procedures. Appropriate budget revision requests are those which propose to use different means to accomplish the original agreed upon goals and objectives outlined in the Scope of Service. In general, adding new line items are not acceptable requests. Agencies may be allowed to shift funds between existing line items due to evolving service needs.

Program budgets may only be revised with the written approval of the **Senior Program Coordinator, Greg M. Lanza**. In order to receive written approval, agencies must submit a budget revision request, including a proposed budget in the appropriate format (see sample on the following page) and a line item budget justification to:

Greg M. Lanza
Senior Program Coordinator
Boston Public Health Commission
Email: glanza@bphc.org

Budget revision requests **must** include the following:

1. A current budget with the proposed changes, and final proposed annual amounts to the right of each personnel and/or expense line item.
2. A detailed explanation for each change being proposed and how it will assist you in meeting your contracted goals and objectives.
3. If proposing to change staffing, please list both the prior and proposed staff on separate lines, detailing the actual salary and FTE for each and applying the appropriate number of months on the contract. Personnel explanations should include: the last name of the employee or, if vacant, the estimated date of hire and a brief description of the position's duties and responsibilities as they relate to the Education & Outreach funding.
4. Supporting documentation for each new staff person including a resume showing qualifications for the position, and proof of annual salary such as an offer letter, employee action form, or payroll statement must be provided.
5. If proposing to change expense items (e.g., food, office supplies, staff travel), explanations should incorporate quantities whenever possible. Explanations should state why an expense item is necessary and how it will be used. For example, travel expenses must specify who, where, when and why the travel is necessary.

Appeals of denied budget revision requests are made, in writing, to the Director of Education & Community Engagement Division, Leslie Karnes.

Budget revisions will not be accepted after April 1, 2021. Exception to this deadline will only be made to fill a vacant position or to change a legal name.

Sample Budget Revision Request Narrative

August 21, 2020

Greg M. Lanza
Senior Coordinator
Infectious Disease Bureau
Boston Public Health Commission
1010 Massachusetts Ave, 2nd Floor
Boston, MA 02118

Dear Mr. Lanza,

Our Program Coordinator, Ms. Jones after 3 months has recently resigned. We have gone through the hiring process for the position and quickly filled the position with Mr. Valdez. We would like to replace Ms. Jones with Mr. Valdez on the budget and increase the FTE. To do this we would like to decrease Program Coordinator Davis due to new funding we have recently received and decrease our Office Supply line. We would like to request the following changes:

+\$22,313 to new Program Coordinator Valdez, replacing Jones and raising that FTE from .75 to .85. We recently received budget cuts from Funding Source A, who was paying for .10 FTE for this position.

-\$2,560 to Program Coordinator Davis, decreasing that FTE from 1.00 to .92. We recently received new funding from Funding Source A, who will now be paying .08 FTE for this position.

-\$84 to the Office Supplies line, decreasing the annual total to \$916.

Please don't hesitate to contact me with any questions regarding this request, by phone at (617) 555-5555, or by email at Project_Director@(agencyname).org.

Sincerely,

Project Director
(Agency Name)

Sample Budget Revision

Boston Public Health Commission
Community Based Prevention

FY 2021

July 1, 2020 - June 30, 2021

(Agency Name)

Education & Outreach

EXAMPLE

Budget Revision Request

<u>Direct Cost</u>	<u>Personnel</u>	<u>Salary</u>	<u>FTE</u>	<u>Mos</u>	<u>Annual</u>	<u>Change</u>	<u>New Salary</u>	<u>New FTE</u>	<u>New Mos</u>	<u>New Annual</u>
Program Coordinator	Jones	\$35,000	0.75	12	\$26,250	(\$19,688)	\$35,000	0.75	3	\$6,563
	Valdez					\$22,313	\$35,000	0.85	9	\$22,313
Program Coordinator	Davis	\$32,000	1.00	12	\$32,000	(\$2,560)	\$32,000	0.92	12	\$29,440
Peer Leader	Brown	\$25,000	0.25	12	\$6,250	\$0	\$25,000	0.25	12	\$6,250
SUBTOTAL			2.00		\$64,500		SUBTOTAL	2.77		\$64,565
FRINGE			29.30%		\$18,899		FRINGE	29.30%		\$18,918
PERSONNEL TOTAL					\$83,399		PERSONNEL TOTAL			\$83,483
Other Direct Cost										
Office Supplies					\$1,000	(\$84)				\$916
Educational Supplies					\$200	\$0				\$200
Food					\$500	\$0				\$500
SUBTOTAL					\$1,700		SUBTOTAL			\$1,616
DIRECT COST TOTAL					\$85,099		DIRECT COST TOTAL			\$85,099
HHS Indirect Approved Rate			69.50%		Annual					
BPHC Community Based Prevention Indirect Cap			12%		\$10,212	\$0		12.00%		\$10,212
INDIRECT SUBTOTAL					\$10,212		INDIRECT SUBTOTAL			\$10,212
DIRECT COST TOTAL					\$85,099	\$0				\$85,099
INDIRECT COST TOTAL (12% Cap)					\$10,212	\$0				\$10,212
E&O SERVICE AWARD TOTAL					\$95,310	\$0				\$95,310

In this example, Program Coordinator Jones has left the agency after 3 months on the E&O contract. Program Coordinator Valdez has replaced Jones for the remaining 9 months of the fiscal year. The agency has decided to raise the new Program Coordinator's FTE from .75 to .85 on the contract. In order to cover the additional dollars, the agency had to reduce Program Coordinator Davis's FTE from 1.0 to .92 and remove \$84 dollars from their Office Supplies line to put into the new Program Coordinator's line. The agency's original budget is reflected in the first six columns. Items and staff names may be added if new staff has been hired. For example, a new line has been inserted to reflect the hiring of Program coordinator Valdez.

Following are terms related to budget revisions. "Change" is the difference between the Annual and the New Annual (Change = New Annual – Annual). "New Salary" is the Full Time Equivalent (1 FTE total) salary. If there is a salary adjustment from the original "Salary", back-up documentation is required (e.g., hire letter, personnel action form). "New FTE" is the new percentage of time that the position listed will be paid through this contract. "New Months" indicates the new number of months that the employee will work; the number would differ from the original budget when a staff person is added or removed from a budget based on hiring or departure. "New Annual" is the updated total salary amount that will be paid for by the grant based on changes made to the salary, FTE, or months in the budget revision. "New Annual" for a staff member who is being removed from a budget must be the actual amount expended based on monthly invoices submitted to date.