

Budget Revisions

Disclaimer: If you are having issues accessing the contents of this document, please reach out to the CAGROWs Team at cagrows@aging.ca.gov for assistance with your budget revision.

Budget revisions are required when changes to the originally approved (see executed agreement) budget occur. Requests for revisions must be made in writing and provide sufficient information to explain the need and how the change affects the project. Reimbursement is available only for approved project activities. Failure to obtain prior approval of Scope and/or Budget revisions may result in costs being deemed unallowable and request for reimbursement denied.

Guidelines

- Nothing from the original budget or previously approved revisions should be deleted. Simply ~~strikethrough~~ what no longer applies.
- Keep all original and previously approved revisions in the same order and add new information where you see fit.
- Make sure that all calculations are correct.
- If the original project scope provides a breakdown, please provide similar breakdowns for revisions.
- Only grant funded activities and costs should be included in the budget revision.
- Revisions must be requested by an authorized official of the grantee organization and approved by CDA.
- No funds may be shifted to senior level staff (e.g., CEO, Director, President, Executive, etc.) at higher hourly rates, or into personnel duties that already fall under the category of indirect costs.
- Changes in personnel that do not impact the proposed hourly rate, position title, or duties (e.g., simply a change in the individual performing the work) do not require a budget revision request.
- Budget Revision Requests may be submitted at a maximum every 2 months. Revisions after July 31, 2024, will not be accepted unless it is a final budget revision.



Process

CDA should be able to review the budget revision and see what has changed since the original approval in an overview. When changes are made to the current budget, please make them in a color that differs from the prior color(s) used. CDA kindly requests that you do not use the “track changes” feature on Word, simply ~~strikethrough~~ what no longer applies and add new language in a new color:

- Budget revision #1: **Blue**
- Budget revision #2: **Orange**
- Budget revision #3: **Purple**
- Budget revision #4: **Red**
- Budget revision #5: **Green**

This will help avoid complications and possibly misunderstanding the intended changes.

Approval

- Budget revisions must be submitted to your assigned Grant Agreement Manager via email along with a brief description of the revisions requested and justification for why they are necessary.
- The CDA Grant Agreement Manager will reply with all questions and concerns.
- Once approved, the Grant Agreement Manager will provide the updated budget which reflects the revision number, date of approval, and color of font used.
- Grantees must update their invoice template to reflect any changes in line item totals.

An **example** of a budget revision is below:



Name	Position/Title	Number of Hours	Hourly Rate	Total
Jonah R.	Project Director	100 80	\$75.00	\$7,500.00 \$6,000.00
Katy P.	Program Manager	500 400	\$55.00 \$60.00	\$27,500.00 \$24,000.00
Carrie G.	Trainer	1000	\$45.00	\$45,000.00
Dan M.	Trainer	400 450	\$45.00	\$18,000.00 \$20,250.00
Corina V.	Marketing and Business Analyst	50	\$50.00 \$55.00	\$2,500.00 \$2,750.00
Personnel Sub-Total				\$82,500.00 \$99,250.00 \$98,000.00