

Grantee Reporting Instructions For Grants \$500,000 or Less

Budget Revision Guidelines



Robert Wood Johnson Foundation

GRANT BUDGET REVISION GUIDELINES – OVERVIEW

When changes in your grant project result in the need for a reallocation of funds, and/or when you anticipate spending in excess of any approved budget categories by more than 10 percent, you will need to request a revision to your approved grant budget. These budget categories are Personnel, Other Direct Costs, and Purchased Services. The guidelines that follow will assist you in preparing your budget revision. If you have any questions, please contact your Grants Administrator.

FORMAT

Your budget revision request should include both a **BUDGET NARRATIVE** and a **LINE-ITEM BUDGET WORKSHEET**. The worksheet should be in a format that displays your entire original budget for that period and your requested changes. Please be sure to specify the budget period and illustrate your reallocation as demonstrated below. In addition, you should include a budget narrative that explains how the revised budget item(s) relate to the project, why the changes are needed, and how the proposed amount(s) were determined. You only need to explain categories that change. If any element of a contract has changed, including the dates, dollars, or deliverables from that previously approved, you will need to submit a copy of the contract amendment or a fact sheet outlining and explaining the elements that have changed. Email your budget revision request to grantreports@rwjf.org or your National Program Office if your project is funded under a Robert Wood Johnson Foundation national program.

SAMPLE LINE-ITEM BUDGET

Grantee (*Insert Institution Name*): _____
 RWJF Grant Identification # (*e.g., 037777*): _____
 Budget Period (*Month/Day/Year through Month/Day/Year*): _____

Line Items	Approved Amount	Revision Request	Proposed Budget	Expenses Incurred (to date)
PERSONNEL	65,000	22,000	87,000	12,250
OTHER DIRECT COSTS (ODC)	18,500	- 10,000	8,500	3,500
PURCHASED SERVICES	45,000	- 12,000	33,000	28,000
TOTAL	128,500	-0-	128,500	43,750

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HELPFUL HINTS

1. Submit your revision in a format that displays your entire budget and your requested changes.
2. Line items for which expenses have been incurred cannot be deleted from your budget. The line item must show the actual expenses incurred as of the date of the revision.
3. Budget revisions may require recalculation of the amount approved for indirect costs.