

## **Grantee Variance Requirements**

Requests for programmatic changes to a current grant agreement or consultant contract will require email communication with the grantee's assigned Program Officer including a formal request and approval via the Project Work Plan document.

Timing of Request: While we require 30 day notice prior to the end of the grant term for any size grant, large grants (over \$50k) can take up to 8 weeks for the Foundation to review and process the requested change. Please note that any changes made by the grantee during this review period could result in a return of funds if the change is not approved by the Foundation.

The Project Work Plan should be used to address the following changes to an active grant:

### **1. Budget revisions**

- Requested when the grantee has a relatively significant change to the allocation of funds provided by PAHWF, may occur in conjunction with a revision to the scope of work. Guidelines for relative significance of changes are determined by grant size.

#### PAHWF Grant Size:

Under \$10,000: Budget change of 10% of total budget  
Between \$10,000 and \$50,000: Budget change of \$1000 or greater  
Over \$50,000: Budget change of \$5000 or greater  
Over \$500,000: Budget change of \$25,000 or greater

- Please submit an email request to the Program Officer with an updated Project Work Plan to file for budget revision. This must include a revised budget form and budget narrative describing the need for and details about the anticipated change to allocation of funds requested from PAHWF.
- No budget revisions will be considered within 30-days of the project end-date. Please use your interim report period to anticipate any budgetary changes. This is the time to request a variance, or as soon as you become aware of any need for one.
- Changes to in-kind line items should also be acknowledged in variance requests.
- You may not change line items or shift funds among line items without a variance.
- After review and if approved the Program Officer will provide notification via email. This will include instructions to upload the approved, revised Project Work Plan into the online grant portal with the Executive Director's signature of agreement to the revisions.

Final budget should align with approved original budget: if it will not, this is a sure sign that you need to request a variance according to your grant size.

## **2. Project End Date Change**

- Requested when the grantee will not expend all of the allocated dollars and/or complete the scope of work at the scheduled end of the grant term OR will have completed the scope of work and expensed the allocated dollars 6 months, or more, ahead of schedule.
- This type of request must be made 30 days prior to the project end-date.
- Please submit an email request to the Program Officer with an updated Project Work Plan to file for a changed end date.
- After review and if approved the Program Officer will provide notification via email. This will include instructions to upload the approved, revised Project Work Plan into the online grant portal with a signature of agreement to the revisions by the grantee's Executive Director.

## **3. Revision(s) to the Scope of Work**

- Requested when the grantee has a circumstance that deems it necessary to change the programs, activities, or deliverables that were originally proposed for the project.
- Please submit an email request to the Program Officer with an updated Project Work Plan to file for a changed end date.
- After review and if approved the Program Officer will provide notification via email. This will include instructions to upload the approved, revised Project Work Plan into the online grant portal with the Executive Director's signature of agreement to the revisions.

## **4. Personnel changes**

- Requested when the grantee has changes to their grant contact or any other person of influence for the delivery of their scope of work.
- Please submit an email request to the Program Officer with an updated Project Work Plan to request a change in personnel.
- The Foundation requires prompt e-mail notification to the Program Officer for these types of changes.
- Please note that an amendment to the project personnel, which reduces the total work to be completed in the project, may result in an adjustment in funding or budget revision.
- After review and if approved the Program Officer will provide notification via email. This will include instructions to upload the approved, revised Project Work Plan into the online grant portal with the Executive Director's signature of agreement to the revisions.

**Addendum A**  
**Variance Policy Changes in Response to COVID-19**  
**These changes are effective April 2020 through June 30, 2021**

- Requested when the grantee has changes to their active grant due to COVID-19
- This would include any type of variance; Budget Revisions, Project End Date Change, Revision of the Scope of Work, and/or Personnel Changes.
- Grantee will submit an email request to your Program Officer as soon as you become aware of the needed change, indicating which type of variance you are requesting.
- Provide as much detail as possible to support the request.
- If changes require budget revisions, a revised project work plan is not required at the time of the variance request. Grantee will provide detail of changes made with the final report and final budget submission.
- After Review the Program Officer will send email notification to Grantee informing of approval status.