

How To Modify An Approved Budget?

Applies to Type 1 budget modifications (i.e. shifts between a unit's category of work, sub-divisions, accounts, geographies or fund class). Approvals for reserve fund transfers are in accordance with the Policy on Reserve Funds.

Programs, Advocacy Offices & Administrative Departments

- 1 Complete budget modification/s in **Adaptive Planning**
- 2 Inform your contact in the Budget Office about submitted modifications to check they have been entered correctly
- 3 Assess modifications against the approval thresholds (**category of work, geography, expense category**)

BELOW THE APPROVAL THRESHOLDS

Modifications will be confirmed in Adaptive Planning by the Budget Office

ABOVE THE APPROVAL THRESHOLDS

- 4 Complete the Budget Modification Request Form (Appendix B of Policy on Budget Modifications)
- 5 Submit the completed request using the e-mail #budgetmodification@opensocietyfoundations.org with the subject "Budget Modification Request". This e-mail will be sent the Office of the President and then will be provided to the Committee on Strategy, Budget and Performance. The Strategy Unit and Budget Office are members of this e-mail distribution list and will automatically receive your request as well.

Units will be notified on approval/rejection by the Office of the President within 10 calendar days. Modifications will be confirmed in Adaptive Planning by the Budget Office upon approval.

Note: All units are encouraged to modify their budgets whenever plans change.