

When to Amend Perkins Application

Please review the following before submitting an amendment:

General Principles

1. Utilize the Guidelines for Changes to Perkins Applications outlined below to ascertain if you need to submit an amendment.
2. Do not submit an amendment solely for the purpose of budgeting indirect costs. Grantees must have an indirect cost rate from their cognizant agency to claim indirect costs. However, indirect costs are not required to be budgeted in the grant application to be charged to the grant.

NOTES:

- All amendment requests must be submitted in the [GMS Portal](#). The deadline for budget amendments is June 1.

Amendment Effective Date

An amendment, after being approved by THECB, is considered effective on the date it was received by THECB upon execution of NOGA/Grant Agreement. All amendments are subject to negotiation. An amendment must be approved by THECB before any activities occur, such as purchase orders issued, funds encumbered or expended, goods received, or services rendered that are affected by the amendment. If the grantee chooses to implement such changes prior to the amendment being approved by THECB, the grantee will be responsible for paying from other fund sources any costs not approved during negotiations.

Instructions for Budgetary Amendments

1. Utilize your Perkins Grant Budget Detail Template to inform your budget change(s).
2. To remove or reduce a line item, indicate the change with a line item showing the amount to be subtracted from the budget category.
3. To increase a line item, use one of the following methods:
 - a. Subtract out the original line item and add a new line-item entry with updated information, including the increased line-item total; OR
 - b. Add a new line item for the increase only. It should be clear which original line item the increase applies to. Add updated information to explain the increase.
4. Indicate the purpose of each line item in clear language: REMOVE, REDUCE, INCREASE, or ADD
5. If the amendment is within the same Budget Category, no updates are required in the Grant Budget Tracker (GBT) within the GMS Portal.
6. If the amendment reallocates funds from one Budget Category to another Budget Category, submit a new change request within the GMS Portal. The GBT within the GMS Portal must also be updated to reflect the changes.
7. Enter the full updated amount for each Budget Category in the "Amended" column within the GBT. Ensure that each Budget Category amount located within the GBT matches the amount in the Perkins Grant Budget Detail Template.
8. **Utilize the entry format examples below for the Perkins Grant Budget Detail Template:**

I. Activity	II. Description	III. Amount
Upgrade Curriculum	(A2) NEW: Scanners (2) are needed for student use, course instruction, and lab application in the Information Technology Systems Program. CLNA Goal II.1.a.	\$ 500
Other	(A1) INCREASE: Printed recruitment materials highlighting CTE programs. Original cost: \$2,000. Final cost: \$4,000. CLNA Goal VI.3.a.	\$ 2,000
Other	Printed recruitment materials highlighting CTE programs.	\$ 2,000

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Guidelines for Application Changes Requiring an Amendment

#	Application Changes	Formula Funded Grant Basic	Discretionary Competitive Grant Leadership	Discretionary Noncompetitive Grant PEAOP
1.	Revise the scope (i.e., extent or range) or objectives of the grant (regardless of whether there is an associated budget revision requiring prior approval).	YES	YES	YES
2.	Add a new line item on any of the supporting budget schedules.	YES	YES	YES
3.	Minor variations costs across expenditure categories (previously Schedules A-F) - except to or from Equipment and other Capital Expenses (previously Schedule C) that do not cumulatively exceed 10% of the total Grant Award).	NO	NO	NO
4.	Temporarily or permanently reassigns any individual named on the Application Cover Page.	YES	YES	YES

#	Compensation – Personal Services <i>(Previously Schedule A)</i>	Formula Funded Grant Basic	Discretionary Competitive Grant Leadership	Discretionary Noncompetitive Grant PEAOP
1.	Add a type of payroll position not initially approved.	YES	YES	YES
2.	Increase the salary amount of funds budgeted for a line item (i.e., a position type such as staff, project director, or faculty) by 10% or less .	NO	NO	NO
3.	Increase the salary amount of funds budgeted for a line item (i.e., a position type such as staff, project director, or faculty) by more than 10% .	YES	YES	YES

#	Travel Costs <i>(Previously Schedule B)</i>	Formula Funded Grant Basic	Discretionary Competitive Grant Leadership	Discretionary Noncompetitive Grant PEAOP
1.	Changes to Conference Information (Professional Development)	NO	NO	NO
2.	Changes to funds allotted for training costs, where such costs are direct payments or reimbursements to trainees, primarily travel and lodging for trainees, workshop.	YES	YES	YES

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#	Equipment and other Capital Expenses <i>(Previously Schedule C)</i>	Formula Funded Grant Basic	Discretionary Competitive Grant Leadership	Discretionary Noncompetitive Grant PEAOP
1.	Add a new item or increase the quantity of capital outlay items approved.	YES	YES	N/A
2.	Change any information or costs in Schedule C: Capital Expenditures and Equipment	YES	YES	N/A

#	Professional Service Costs <i>(Previously Schedule D)</i>	Formula Funded Grant Basic	Discretionary Competitive Grant Leadership	Discretionary Noncompetitive Grant PEAOP
1.	Change name of subcontractor/contractor	YES	YES	YES
2.	Change scope of services	YES	YES	YES

#	Materials and supplies costs, including costs of computing services <i>(Previously Schedule F)</i>	Formula Funded Grant Basic	Discretionary Competitive Grant Leadership	Discretionary Noncompetitive Grant PEAOP
1.	To add to or change the supplies and materials already approved unless the amendment is required for another reason outlined in this document. Supplies and materials do not require specific approval under EDGAR but must be budgeted in the grant application in order to be charged to the grant	NO	NO	NO

#	Administration – Indirect Costs <i>(Previously Schedule G)</i>	Formula Funded Grant Basic	Discretionary Competitive Grant Leadership	Discretionary Noncompetitive Grant PEAOP
1.	To add or change administrative/indirect costs incurred during the grant period. An appropriate amount must be budgeted in the initial Application or in a subsequent amendment	YES	YES	YES

If there are transfers among the Budget Categories, begin a new change request within the GMS Portal. Update the Grant Budget Tracker with the updated amount(s) for each Budget Category (enter the full amount for each Budget Category). For a non-reallocation amendment, confirm that the “Amended Request Total” equates to the “Granted Request Total.” For a Reallocation Amendment, the “Amended Request Total” will equate to the reallocated total.