

**Instructions:**

- Please complete this form and email it, with any supporting documents, to Lisa Merola-Grimm, Assistant Vice President for Financial Planning & Analysis (Lisa.Merola@yale.edu), and copy your budget analyst.
- All Out-of-Budget requests must be reviewed and approved by Budget Strategy.
- Requests including full-time employees ("FTEs") must provide an organizational chart and information about space planning for the additional staff. An FTE will not be approved unless the unit can confirm space for the staff is available in the existing footprint of the unit.

Request Basic Information			
Planning Unit:			
Requestor(s):			
Amount Requested:			
Source(s) of Funding:			
Reason for Request:	<input type="checkbox"/> FTE(s) <input type="checkbox"/> New Program(s) <input type="checkbox"/> Equipment <input type="checkbox"/> Other	If "Other," please explain:	

Request Details
<p>In the space below, please provide a detailed description of the Planning Unit's "ask" for this Out-of-Budget request. This includes:</p> <ul style="list-style-type: none">• Description of the request• Funding Source (GA, endowment, gift, etc.)• If self-funded (non-GA funding), confirm availability of funds for duration of activity• Duration of activity (One-time, Fixed Duration for specified number of years, Ongoing)• Financial impact, both pro-rates for current fiscal year and the annualized ongoing cost if the request is ongoing in nature• Financial impact should be summarized as well as detailed (details can include but not be limited to: salary, fringe, total compensation, non-salary, incremental revenue, gross impact, net impact)• FTE impact (include staff category (M&P/C&T/S&M, Temp, Student) and FTE by position)• If FTE is requested, regardless of funding source, an organizational chart showing the new position(s) in the context of the current organization and confirmation of workspace planning is required. Incremental FTE will not be approved unless the unit has a plan for how to accommodate the new staff in the current footprint of the unit
<p>In the space below, please explain the consequence(s) if this Out-of-Budget request is either not approved or not fully approved</p>

- Please submit completed forms to lisa.merola@yale.edu -

- Questions? Please contact your planning unit's assigned FP&A Financial Analyst: [Financial Analyst Coverage by Planning Unit Breakdown](#) -