FY26 New Mexico Clean & Beautiful

Budget Amendment Requests (BARs)
How-To

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Today's Agenda

Budget Amendment Requests (BARs)

- Do you need to submit a BAR?
- How to complete the BAR form.
- How to submit a BAR via Survey Monkey Apply.

*** General Reminders**:

- This webinar is recorded & available on the Clean & Beautiful Resources Page.
- After watching the presentation, if you have additional questions, please reach out to NMTD staff for assistance.



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What is a Budget Amendment Request?

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Budget Amendment Requests are necessary to adjust allocations on your current Project Award Schedule – Exhibit A of your Grant Agreement

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Amending the Personalized Project Award Schedule

FY26 New Mex	ico Clean &	& Beautiful	Grant Progr	am	
		BIT A			
	PROJECT AWA				
CITY, COUNTY, P	UEBLO, TOW	/N, SCHOOL	, VILLAGE OF	XXX	
Goals & Objectives	Goal 1	Goal 2	Goal 3	Goal 4	Goal 5
End Littering					
1.1 Anti-Litter Signage	\$150.00				
Approved Expenditures: Signs					
1.2 Community Clean-up Event	\$6,000.00				
Approved Expenditures: Roll-off and disposal fees					
1.3 Clean-up Activities	\$2,000.50				
Approved Expenditures: Trash bags, trash grabbers,					
nitrile gloves and safety vests					
Reduce Waste					
2.5 Recycling Container		\$1,000.00			
Approved Expenditures: Two recycling containers for recy	cling center				
Beautify Communities					
3.2 Pollinator Garden			\$2,000.00		
Approved Expenditures: Flowers, trees, and soil					
3.3 Community Mural Projects			\$1,000.00		
Approved Expenditures: Paint, brushes, rollers, drop cloti	ns, and trays				
3.4 Graffiti Eradication			\$2,000.00		
Approved Expenditures: Brushes and paint					
Empower Youth					
4.2 Youth Group Stipends				\$5,000.00	
Approved Expenditures: Subcontracted youth groups for	community clean-up	or beautification proj	iects		
ncrease Program Capacity					
5.2 Keep America Beautiful Dues					\$253.00
Approved Expenditures: Keep America Beautiful Dues					
5.3 Keep America Beautiful Annual Conference					\$2,200.00
Approved Expenditures: Conference stipend					
Goal Subtotals	\$8,150.50	\$1,000.00	\$5,000.00	\$5,000.00	\$2,453.00
Total Award			\$21,603.50		
Total Award			421,000.00		

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Do I need to submit a BAR?

A BAR is necessary if:

- You anticipate exceeding the 10.0% allowed budget variance for a specific line item (objective) to meet the deliverable.
- You anticipate not being able to spend the full grant award based on the current funding distribution.
- You will come in <u>under budget</u> for a project and will still meet the deliverable.
 - Example: Additional funding and community donations were received
- Projects listed on your current Project Award Schedule are no longer feasible due to unforeseen circumstances.
 - Example: Staffing issues or change of location

A BAR is not necessary if:

• You follow the Project Award Schedule as outlined in *Exhibit A* of the Grant Agreement.

• You foresee that you will overspend in a line item but will be within the 10.0% variance.

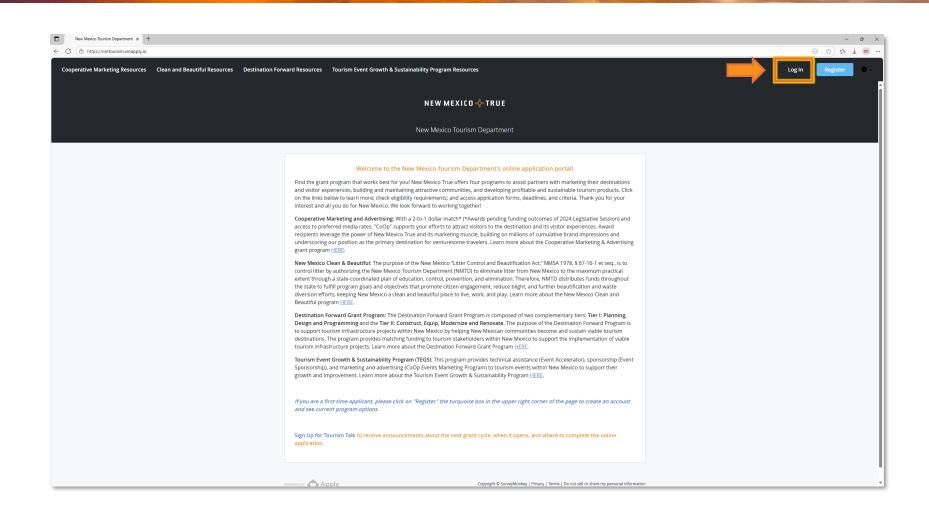
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Survey Monkey Apply



Log in to Survey Monkey Apply



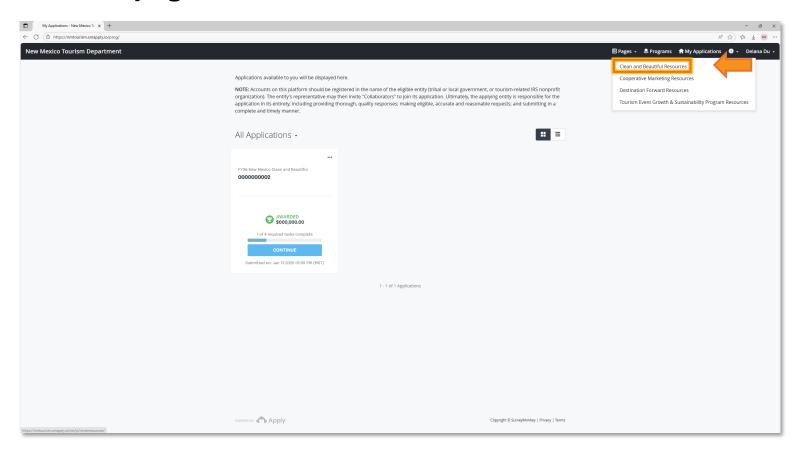
Download Budget Amendment Request Form

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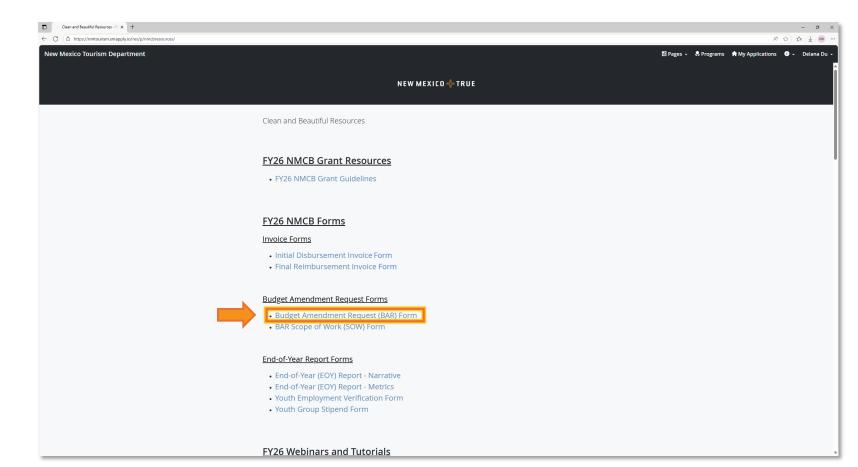
Clean and Beautiful Resources Page

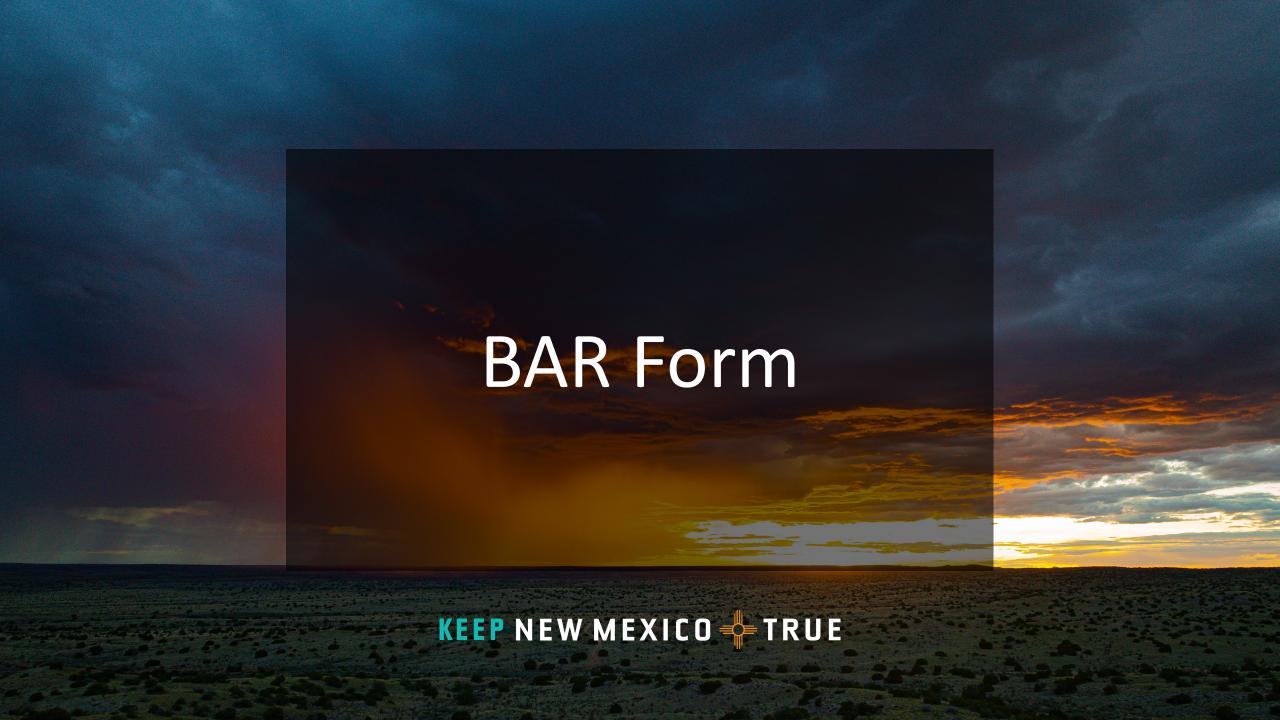
On the top right-hand corner, select pages and click on Clean and Beautiful Resources.

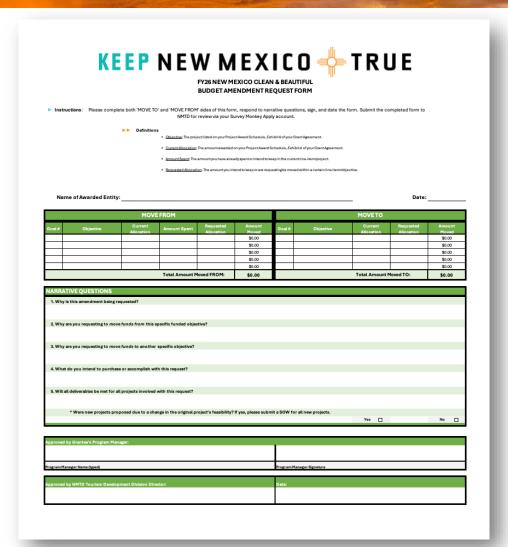


Download the BAR Form

Under the Clean and Beautiful Resources Page, download the BAR Form



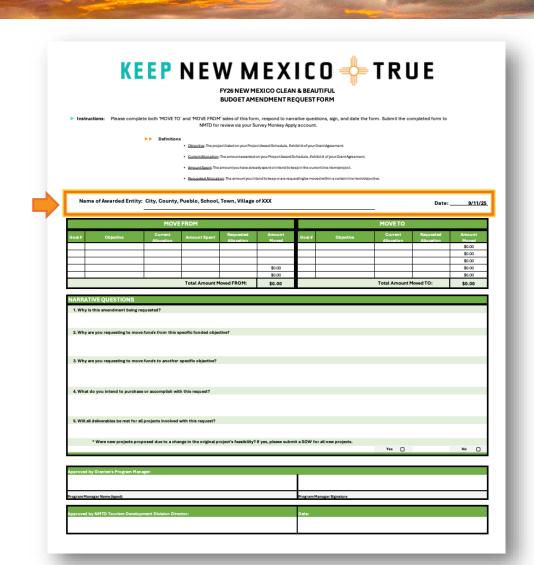




Name of Awarded Entity

Date

- Provide the awarded Entity's name as it appears on the Grant Agreement.
 - Please note that your KAB affiliate name is not the awarded Entity.
- Provide the date you are submitting the BAR from on.





Partners are responsible to complete the fields below on the MOVE

Goal Number

FROM (left-hand side).

Objective

Current Allocation

Amount Spent

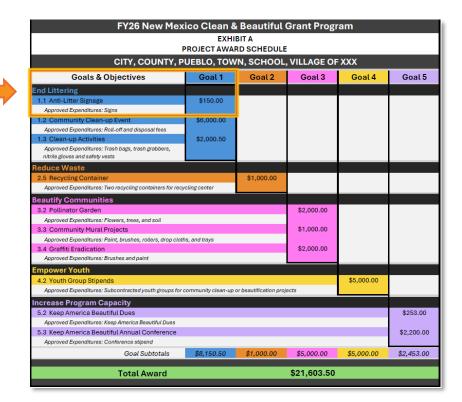
Requested Allocation

Amount Moved

Total Amount Moved From

MOVE FROM

Goal Number, Objective, & Current Allocation



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FY26 NEW MEXICO CLEAN & BEAUTIFUL BUDGET AMENDMENT REQUEST FORM

- Instructions: Please complete both "MOVE TO" and "MOVE FROM" sides of this form, respond to narrative questions, sign, and date the form. Submit the completed form to NMTD for review via your Survey Monkey Apply account.
 - Definitions
 - Objective: The project listed on your Project Award Schedule, Exhibit A of your Grant Agreeme
 - Current Allocation: The amount awarded on your Project Award Schedule. Exhibit A of your Grant Agreement.
 - Amount Spent: The amount you have already spent or intend to keep in the current line-item/project.
 - Bequested Allocation: The amount you intend to keep or are requesting be moved within a certain line item/objective

Name of Awarded Entity: Date:

		MOVE	FROM					MOVETO		
Goal#	Objective	Current Allocation	Amount Spent	Requested Allocation	Amount Moved	Goal#	Objective	Current Allocation	Requested Allocation	Amount Moved
					\$0.00					\$0.00
					\$0.00					\$0.00
					\$0.00					\$0.00
					\$0.00					\$0.00
					\$0.00					\$0.00
			Total Amount M	loved FROM:	\$0.00		<u> </u>	Total Amount №	foved TO:	\$0.00

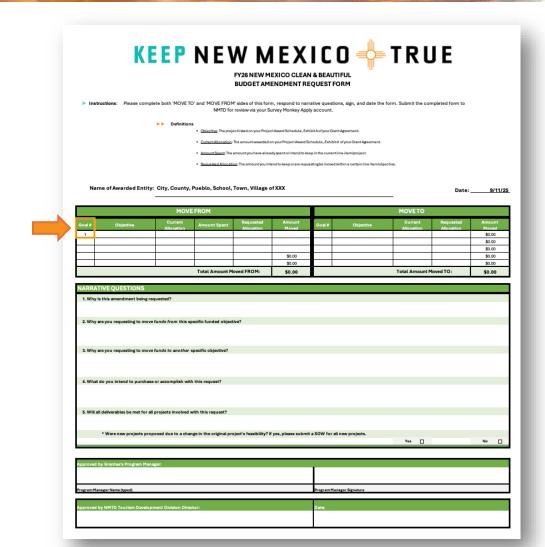
NARRATIVE QUESTIONS					
1. Why is this amendment being requested?					
2. Why are you requesting to move funds from this specific funded objective?					
3. Why are you requesting to move funds to another specific objective?					
4 100 - 4 100 -					
4. What do you intend to purchase or accomplish with this request?					
5. Will all deliverables be met for all projects involved with this request?					
* Were new projects proposed due to a change in the original project's feasibility? If yes, please submit a SOW for all new projects.					
	Yes		N	io	

	Approved by Grantee's Program Manager:	
	Program Manager Name (typed)	Program Manager Signature
-		
	Approved by NMTD Tourism Development Division Director:	Date:
	Approved by NMTD Tourism Development Division Director:	Date:

MOVE FROM

Goal Number

Provide the goal number as outlined on the Project Award Schedule, Exhibit A of your FY26 Grant Agreement.



MOVE FROM

Objective

Provide the specific objective number as outlined on the Project Award Schedule, Exhibit A of your FY26 Grant Agreement.



MOVE FROM

Current Allocation

- Provide the objective's corresponding current allocation amount.
 - This amount will match the allocation from your Project Award Schedule, *Exhibit A* of your FY26 Grant Agreement.



MOVE FROM

Amount Spent

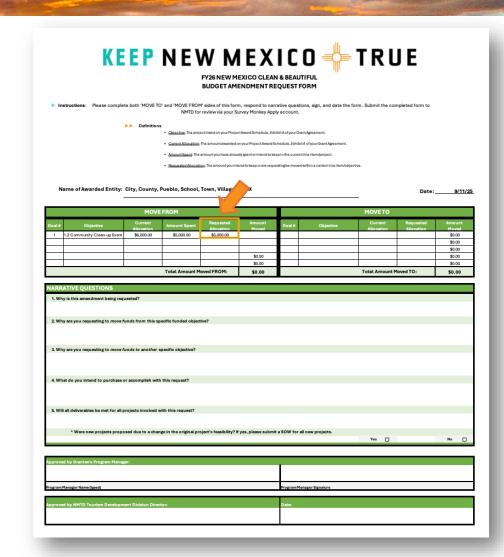
- Provide the objective's total expenditures to date.
 - This column serves as a reassessment measure to ensure that you have not spent the funds you are requesting to move.



MOVE FROM

Requested Allocation

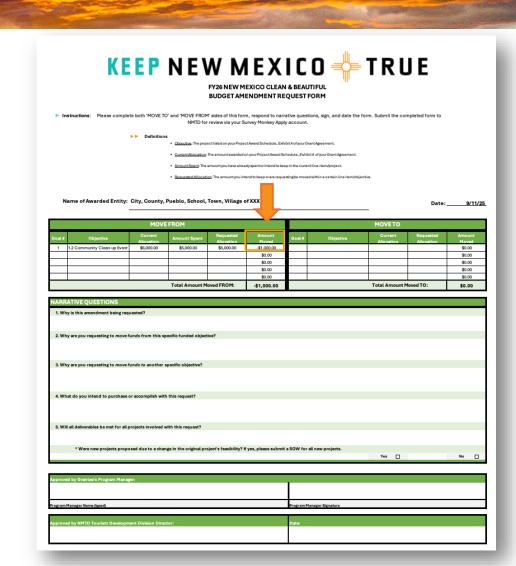
- Provide the total amended amount that you are requesting for the goal and objective.
 - This is the amount that will appear on the Amended Project Award Schedule, *Exhibit A* of your Grant Agreement.



MOVE FROM

Amount Moved

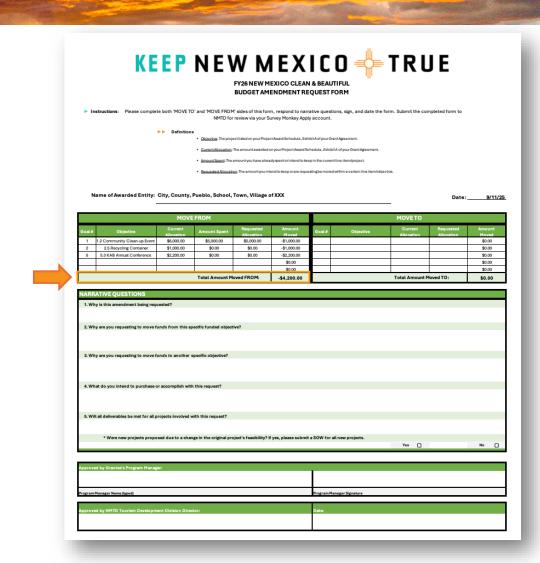
- This amount is the difference between the requested allocation and the current allocation.
 - The form will automatically calculate this amount for you.



MOVE FROM

Total Amount Moved From

- The *Total Amount Moved From* represents the total of all funds you are intending to move from the goal and objectives listed on the left-hand, Move From Side.
 - The form will automatically calculate this amount for you.





Partners are responsible to complete the fields below on the MOVE

TO (right-hand side).

Goal Number

Objective

Current Allocation

Amount Spent

Requested Allocation

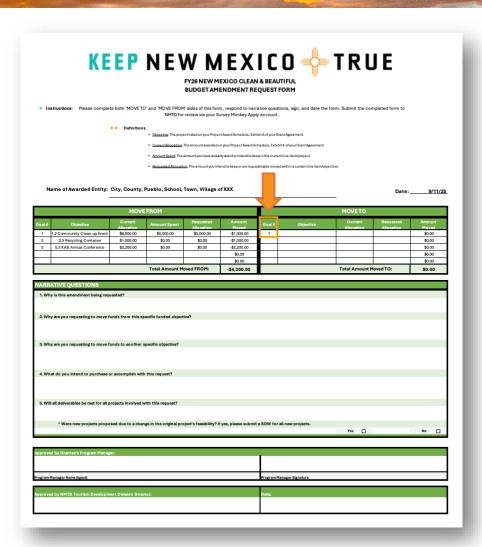
Amount Moved

Total Amount Moved to

MOVE TO

Goal Number

Provide the goal number as outlined on the Project Award Schedule, Exhibit A of your FY26 Grant Agreement.

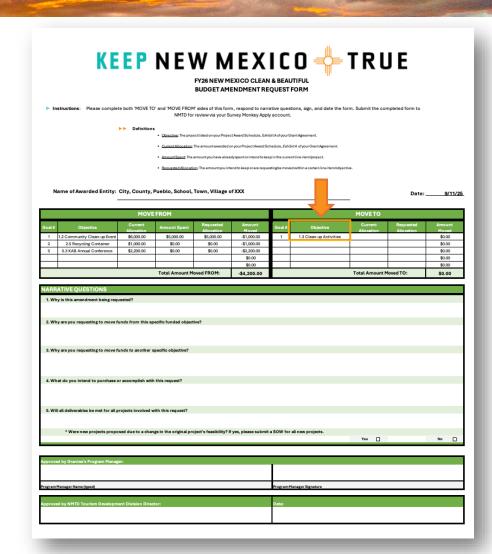


MOVE TO

Objective

Provide the specific objective number as as outlined on the Project Award Schedule, *Exhibit A* of your FY26 Grant Agreement.

When creating a new objective, if you are unsure what goal and objective is appropriate for your new project, please contact NMTD Staff.



MOVE TO

Current Allocation

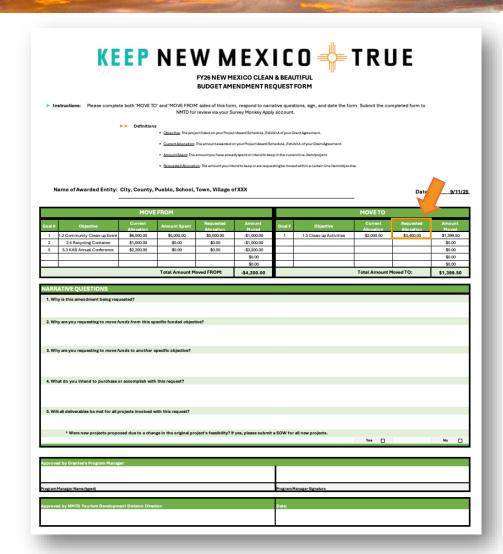
- Provide the objective's corresponding current allocation amount as outlined on the Project Award Schedule, *Exhibit A* of your FY26 Grant Agreement.
 - If you are creating a new line item, this amount should be \$0.00.



MOVE TO

Requested Allocation

- Provide the amended amount that you are requesting for the goal and objective.
 - This is the amount that will appear on the Amended Project Award Schedule.



MOVE TO

Amount Moved

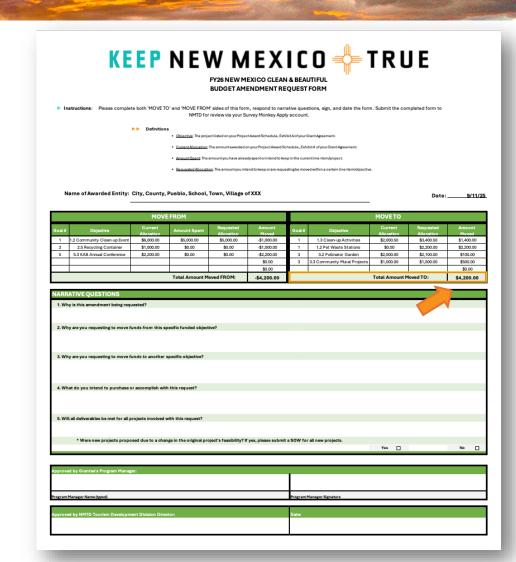
- This amount is the difference between the requested allocation and the current allocation.
 - The form will automatically calculate this amount for you.



MOVE TO

Total Amount Moved To

- This *Total Amount Moved* To represents the total of all funds you are intending to move.
 - The form will automatically calculate this amount for you.



MOVED FROM & MOVED TO

Total Amounts Moved From & Moved To

The Total Amount Moved FROM

This amount will be a *negative number*. The form will automatically calculate this amount for you.

The Total Amount Moved TO

This amount will be a positive number. The form will automatically calculate this amount for you.

* Please note both totals should mirror one another.





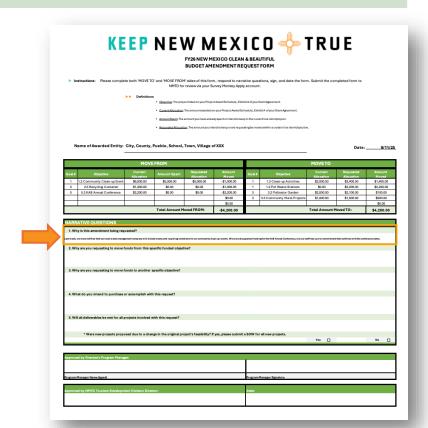
NARRATIVE

In this section of the BAR Form, Partners must justify why their request to move funds is necessary. This justification does not need to be lengthy, but your response must answer the questions.

NARRATIVE

1. Why is this amendment being requested?

Last week, we were notified that our local waste management company will donate waste and recycling containers for our community clean-up events. We were also granted funding for the KAB Annual Conference, but our staff has a prior commitment that conflicts with the conference dates.



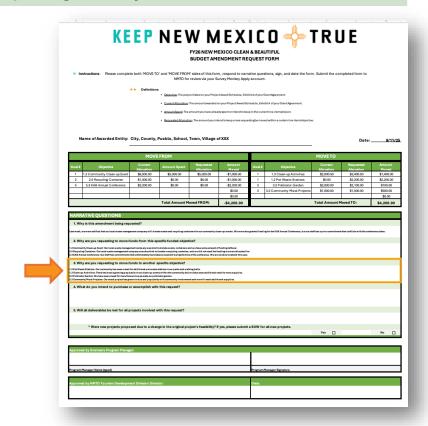
NARRATIVE

- 2. Why are you requesting to move funds from this specific funded objective?
- 1.2 Community Clean-up Event: Our local waste management company was kind to donate waste containers and we have some amount of funding leftover.
- 2.5 Recycling Container: Our local waste management company was also kind to donate a recycling container, and we did not need the funding we were allocated for.
- 5.3 KAB Annual Conference: Our staff has commitments that unfortunately have taken precedent during the time of the conference. We are not able to attend this year.



NARRATIVE

- 3. Why are you requesting to move funds to another specific objective?
- 1.2 Pet Waste Stations: Our community has seen a need for additional pet waste stations in our parks and walking trails.
- 1.3 Clean-up Activities: There has been a growing popularity in our clean-up events within the community, and we have seen additional need for more supplies.
- 3.2 Pollinator Garden: We have seen a need for more flowers to populate our pollinator garden.
- 3.3 Community Mural Projects: Our mural project has grown in size and popularity with community involvement, and we will need additional supplies.



NARRATIVE

- 4. What do you intend to purchase or accomplish with this request?
- 1.2 Pet Waste Stations: We intend to purchase three pet waste stations- 2 at the walking trail entrance and exit and 1 in the main park.
- 1.3 Clean-up Activities: We intend to purchase gloves and bags.
- 3.2 Pollinator Garden: We intend to purchase more flora for the pollinator garden.
- 3.3 Community Mural Projects: We intend to purchase more paint and rollers for the mural.



NARRATIVE

5. Will all deliverables be met for all projects involved with this request?

Yes, all deliverables will be met as outlined in Exhibit A of our grant agreement. This includes all objectives from which funding was moved from as well all objectives to which funding was moved to.





SCOPE OF WORK

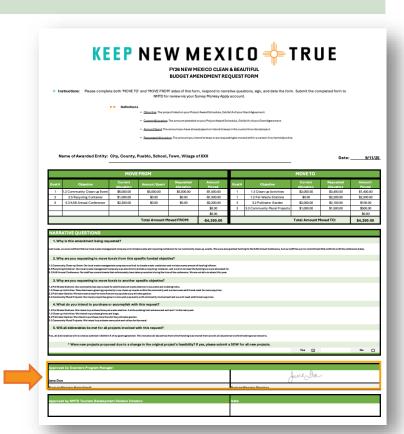
- Were new projects proposed due to a change in the original project's feasibility?
 - If yes, please submit a Scope of Work (SOW) for all new projects.





REVIEW & SIGN

Please review all areas of your request. All required fields must be completed, and the document must be signed.



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Scope of Work Form (SOW)

What is a Scope of Work?

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A Scope of Work is necessary:

WHEN CREATING A NEW PROJECT

- If a project is no longer feasible, Partners have the opportunity to create a new line item.
 - New line items require a <u>Scope of Work</u> be submitted to NMTD for approval.
 - New line items should have \$0.00 provided under this column.
 - If you are unsure what goal and objective is appropriate for your new project, please contact NMTD Staff.
 - Please note that if a request from your grant application was not initially approved, you are not able to substitute funds from onmse item to another.

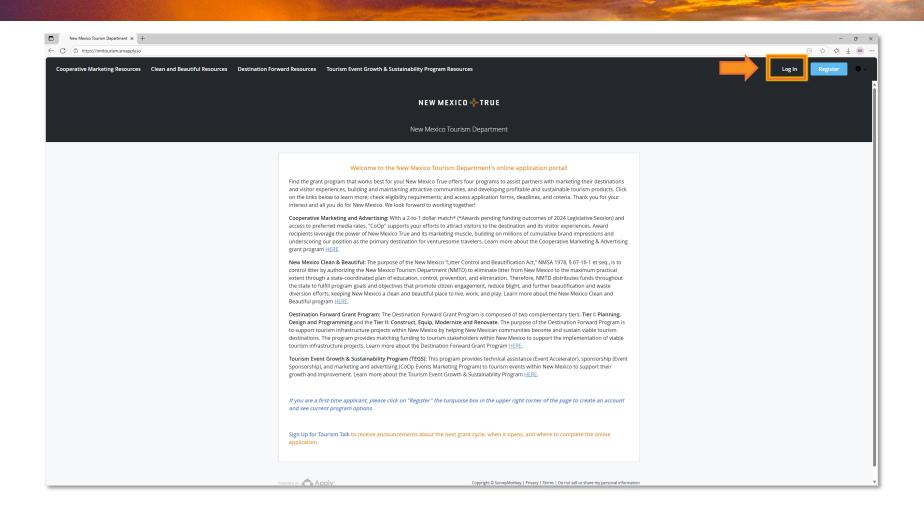
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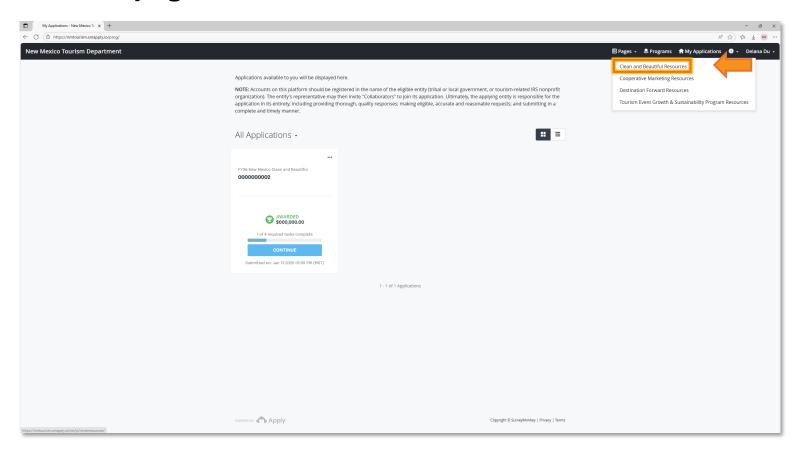
Download Scope of Work Form

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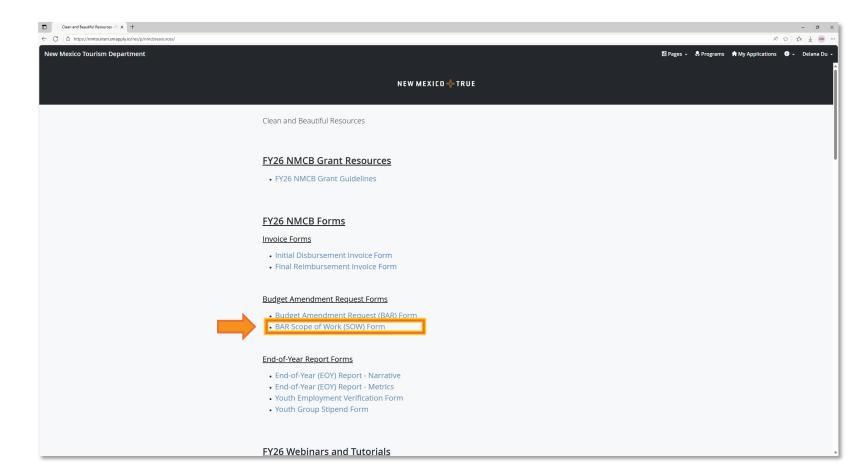
Clean and Beautiful Resources Page

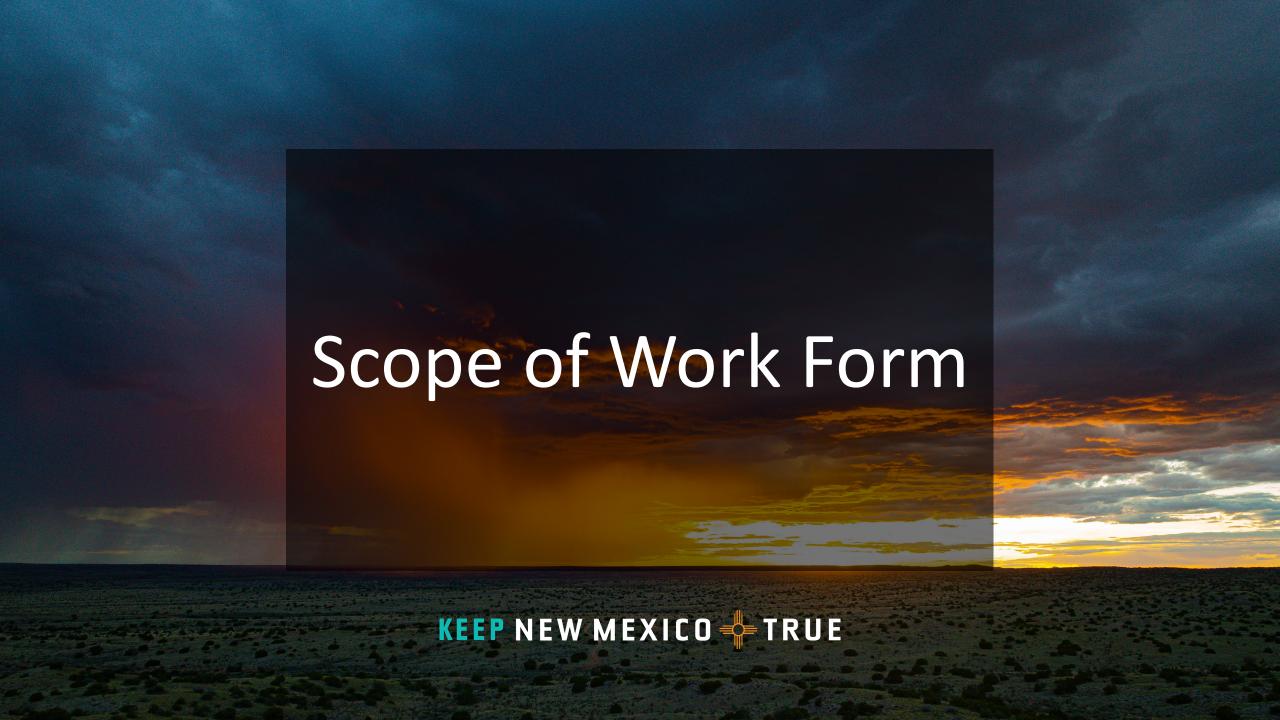
On the top right-hand corner, select pages and click on Clean and Beautiful Resources.



Download the Scope of Work Form

Under the Clean and Beautiful Resources Page, download the BAR Form





Scope of Work Form

Partners are responsible to complete the fields below on Scope of Work Form (SOW).

Name of Awarded Entity

Project Summary

Statement of Need

Anticipated Outcomes

Promotional Strategy

Quarterly Milestones

Budget Schedule

NAME OF AWARDED ENTITY

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FY26 NEW MEXICO CLEAN & BEAUTIFUL
SCOPE OF WORK FOR BUDGET AMENDMENT REQUESTS FORM

Instructions: Please complete the following to propose a new project due to a change in an existing project's feasibility.

Name of Awarded Entity

City, County, Pueblo, School, Town, Village of XXX

PROJECT SUMMARY

Detail all project efforts:

• The community has seen a need for more pet waste stations, especially in our public spaces like our walking trails and park. We do not want members of our community or guests to accidentally step on pet waste.

Project Summary

Detail all project efforts.

The community has seen a need for more pet waste stations, especially in our public spaces like our walking trails and park. We do not want members of our community or guests to accidentally step on pet waste.

STATEMENT OF NEED

Detail how you determined the need for these project efforts:

• We currently have one in our park, but we have noticed that a lot of people walk their pets on the trails and there is currently not one either at the entrance or the exit.

Statement of Need

Detail how you determined the need for these project efforts.

We currently have one in our park, but we have noticed that a lot of people walk their pets on the trails and there is currently not one either at the entrance or the exit.

ANTICIPATED OUTCOMES

Detail the anticipated outcomes for these project efforts and how you plan to measure success:

• We hope that folks will use the pet waste station to pick up their pet's waste and dispose of it properly. We plan to measure success by taking walks on our walking trail and around our parks to see if there is less pet waste left on the ground.

Anticipated Outcomes

Detail the anticipated outcomes for these project efforts and how you plan to measure success.

We hope that folks will use the pet waste station to pick up their pet's waste and dispose of it properly. We plan to measure success by taking walks on our walking trail and around our parks to see if there is less pet waste left on the ground.

PROMOTIONAL STRATEGY

Detail any outreach strategies aimed to increase awareness of these project efforts:

• We will be working closely with our Parks and Recreation Department to design signs to indicate where the pet waste stations are located. We also plan to put it on our digital community bulletin board on our website and advertise it on Facebook.

Promotional Strategy

Detail any outreach strategies aimed to increase awareness of these project efforts.

We will be working closely with our Parks and Recreation Department to design signs to indicate where the pet waste stations are located. We also plan to put it on our digital community bulletin board on our website and advertise it on Facebook.

QUARTERLY MILESTONES

Complete the anticipated quarterly milestones:

Quarterly Milestones						
	Complete the anticipated quarterly milestones.					
Q1:		Q2:	Work with Parks and Recreation Department to figure out the best place for the stations. Work on designing signs with them as well.			
	Q1 Complete					
Q3:	Purchase pet waste stations and install.	Q4:	Measure early outcomes and submit all financial documentation to NMTD.			

Scope of Work Form

BUDGET SCHEDULES

Complete the budget schedule form:

- List the following for each expenditure:
 - Goal & Objective
 - Expenditures
 - Cost Breakdown
 - Funding Request

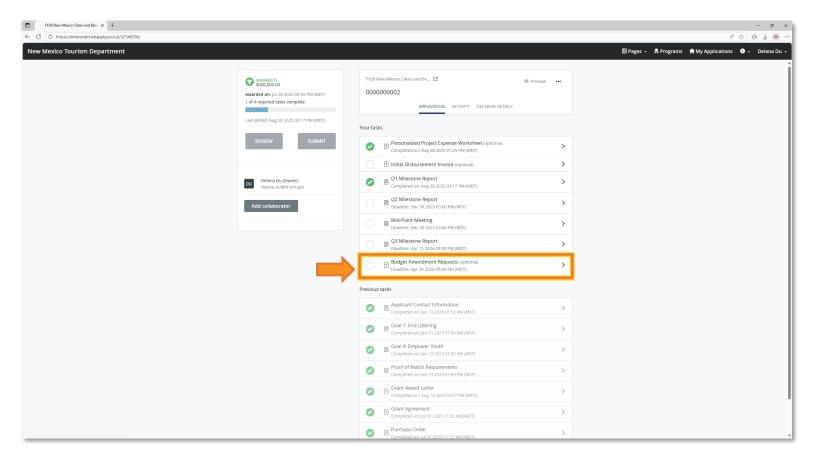
Budget Sche	edule				
 Complete the budget schedule template. List the objective, cost breakdown, and funding request for each expenditure. 					
Goal & Objective	Expenditure (Intended items you wish to purchase)	Cost Breakdown (cost per item)	Funding Request (Total Amount Requested)		
1.2 Pet Waste Stations	3 Pet Waste Stations	\$700 per station plus \$100 shipping	\$2,200.00		



Upload Submission Survey Monkey Apply

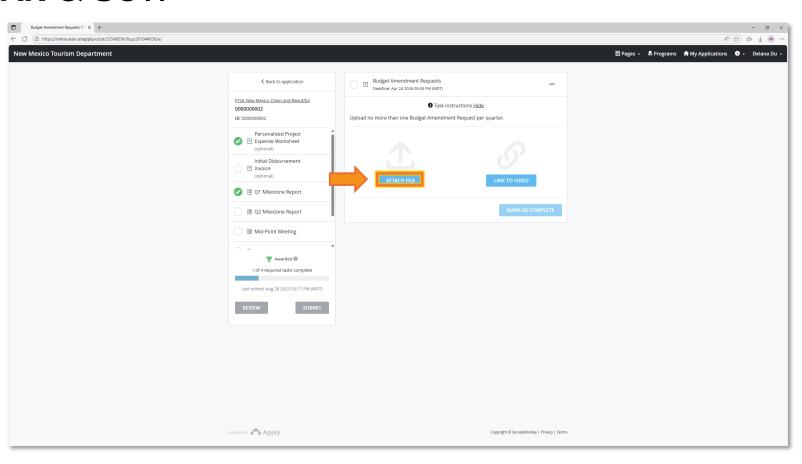


UPLOAD COMPLETED BAR & SOW



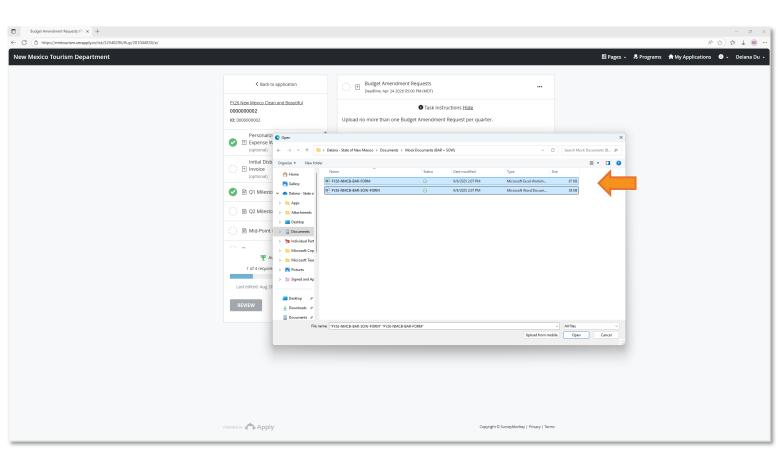
UPLOAD COMPLETED BAR & SOW

Attach File(s)



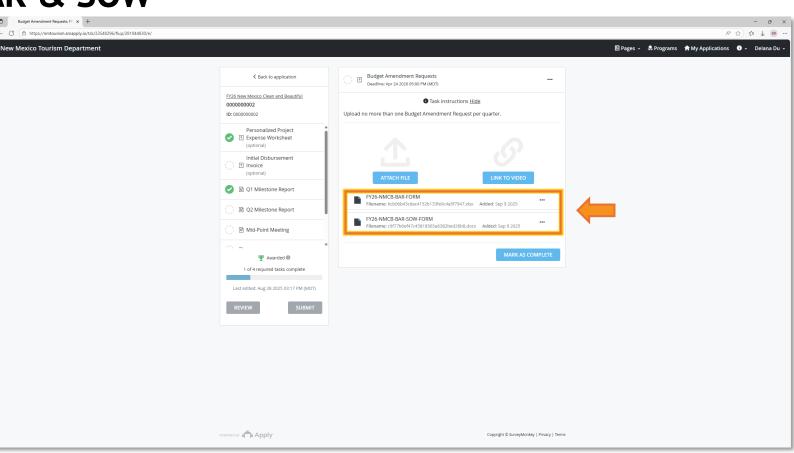
UPLOAD COMPLETED BAR & SOW

Select Files to Upload



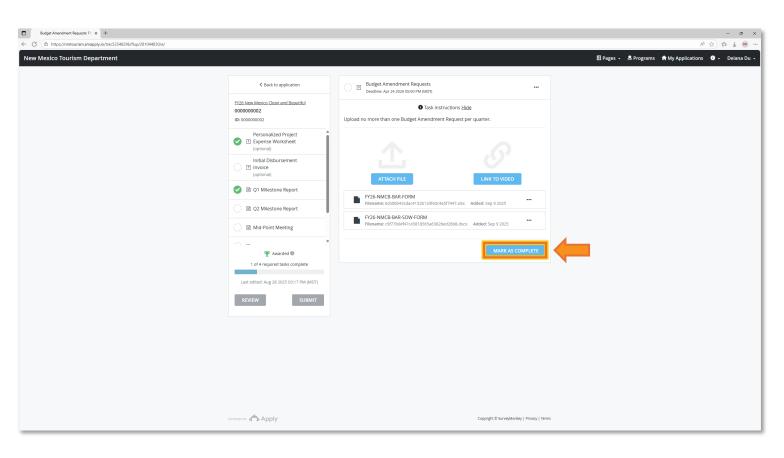
UPLOAD COMPLETED BAR & SOW

Successful Upload



UPLOAD COMPLETED BAR & SOW

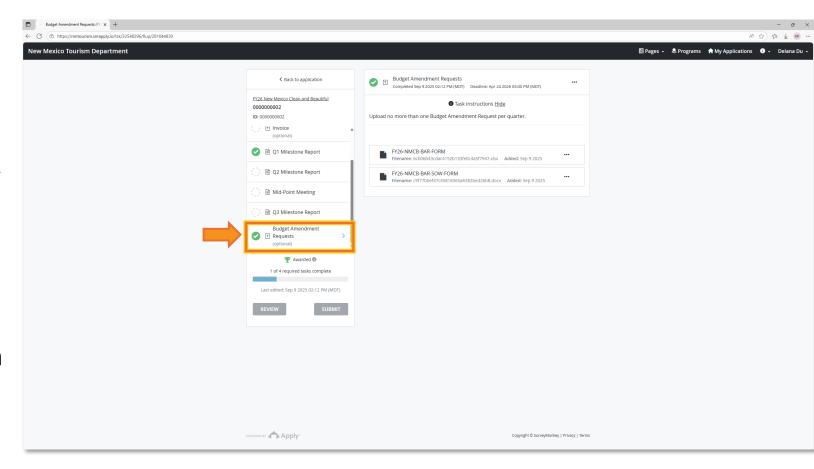
Mark Task as Complete



UPLOAD COMPLETED BAR & SOW

Task is Complete

If you see a *full green* circle
 with a checkmark to the left
 of your Budget Amendment
 Requests task, this indicates
 your task been submitted to
 NMTD and no further action
 is needed.



Budget Amendment Request Approval Process



Budget Amendment Request Approval

APPROVAL PROCESS

- Partner submits completed Budget Amendment Request (BAR) and potential new Scope of Work (SOW) documents.
- NMTD Staff reviews BAR and SOW documents.
- Once your BAR and potential SOW have been approved, an Amended Grant Agreement will be routed via Docusign to the Partner's Signatory Authority for signature and approval.
- NMTD will upload your amended Personalized Project Expense Worksheet to your Survey Monkey Apply account, as well as all other corresponding documents.
- * After the Partner and NMTD have signed the Amended Grant Agreement, it is fully executed and the changes made with the BAR and SOW can begin.

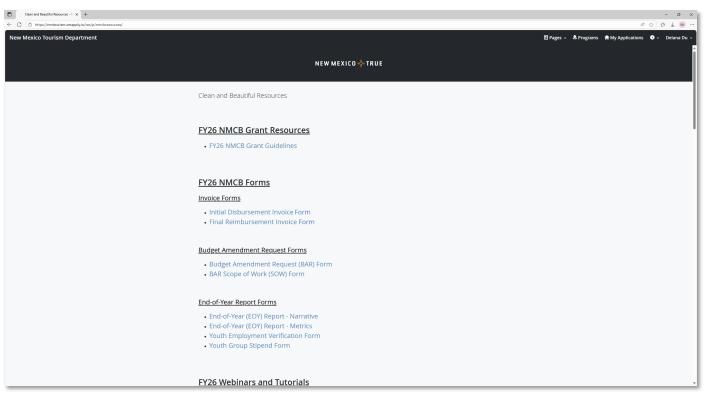




Clean & Beautiful Resources Page

The <u>Clean & Beautiful Resources Page</u> is located on the <u>Survey Monkey Apply Portal</u>.

- Grant Guidelines
- Program Forms
- Recorded Webinars & Tutorials
- Weekly Coffee Hours Meeting Info
- Past Coffee Hours Recordings







Frequently Asked Questions

Q: Do we need to balance the BAR Form per line?

A: No, you do not need to balance the BAR Form per line. The totals on the move to and move from sides of the Form need to balance.

Q: We need to modify our approved expenditures that were outlined in our Personalized Project Expense worksheet by NMTD, do we need a BAR?

A: Yes, you will need to submit a BAR, all approved expenditures are outlined per objective/project by NMTD.

Q: We anticipate spending 10.0% or less of our allocated budget for a specific line item, do we need a BAR?

A: No, you will not need a BAR if you spend 10.0% or less than the amount on your project award schedule; you are allowed a 10.0% variance.

Q: Can we submit two BARs in one quarter?

A: No, only one BAR can be submitted per quarter, in Q1, Q2, and Q3. BARs are not accepted in Q4. Partners have until April 24, 2026, to submit their final BAR.

Q: Once we have submitted a BAR via Survey Monkey, can we start to make the proposed changes to our project plans?

A: No, you may begin to make proposed changes once your BAR has been approved by NMTD and an amended project award schedule has been issued.

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Chantal S. Sandoval
Clean and Beautiful Program Manager
Chantal.Sandoval@td.nm.gov
(505) 670-8059



Delana Du
Clean and Beautiful Program Management Analyst
Delana.Du@td.nm.gov
(505) 479-2564

Clean & Beautiful Resources Page

