

Instructions for Completing the Rescheduling Request Form

The purpose of this document is to explain what information is expected in each section of the form.

It is anticipated that the project sponsor/contractor will discuss the rescheduling request with the BPA Project Manager/COTR prior to submitting the form. While it is the sponsor's responsibility to fill out and submit Sections 1-3 of the form, BPA COTRs are available to provide information and assistance.

Section 1: General Administrative Information

To be filled out by the project sponsor/contractor

This section is used to capture the biographical information about the project. The key consideration for this section is that the information is accurate. The project and contract names and numbers must match the records in BES, BPA's financial information system. If you are unsure about the project or contract name or number, please contact your COTR.

Please note that the Council, CBFWA, and BPA will consider rescheduling requests at the project level. However, BPA must also track rescheduling requests at the contract level, so please provide the contract name and number associated with this request.

Field	Description	Instructions
BPA Project Number	This is the 9-digit number of the project, assigned by BPA.	This number must match what is shown in BES (BPA's financial database). Please contact your COTR if you are unsure how your project number is recorded in BES.
BPA Project Name	This is the name of the project, as recorded in BES (BPA's financial database).	This name must match what is shown in BES. Please contact your COTR if you are unsure how your project name is recorded in BES.
BPA Contract Number and Release (if applicable)	This is the BPA contract number associated with this rescheduling request. Some contracts have release numbers; others do not.	The contract number and release (if applicable) must match what is shown in BES (BPA's financial database). Please contact your COTR if you are unsure how your contract number and/or release are recorded in BES. If there are multiple contracts under this project, you

		should only list the name and number of the contract that needs to reschedule work. If more than one contract under a project needs to reschedule work, please fill out a separate form for each of these contracts.
BPA Contract Name	This is the name of the contract, as recorded in BES (BPA's financial database).	This name must match what is shown in BES. Please contact your COTR if you are unsure how your contract name is recorded in BES.
BPA Project Manager/Contracting Officer's Technical Representative (COTR)	This is the person at BPA who receives and reviews your Statements of Work, Budgets and Work Schedules, and approves your invoices.	If you are unsure who your COTR is, you may contact Cate Hanan at 503-230-5276 for assistance.
Business Name of Agency, Institution or Organization Requesting Rescheduling	This is the official name of your organization, not the acronym.	Be as descriptive as possible, for example: "Bonneville Power Administration Division of Fish and Wildlife."
Contact Person	This is the name and contact information of the person making the rescheduling request.	The following fields are required: first and last name, mailing address, and phone number.

Section 2: Financial Information/Budget for Rescheduled Tasks

To be filled out by the project sponsor/contractor

This section is used to capture the dollar amount associated with the rescheduling request.

Field	Description	Instructions
Original Budget for Rescheduled Tasks, FY 2003	This is the total amount the tasks would have cost had they been performed in FY 2003 as planned, based the most recent Budget and Work Schedule approved for this project.	Add up the costs of <u>all</u> work to be rescheduled from FY 2003 to FY 2004, based on your FY 2003 budget. Do not list the budget for each task in this section; you will be asked to break down costs by task in Section 3.
Proposed Budget for Rescheduled Tasks, FY 2004	<p>This is the total amount the tasks will cost if rescheduling is approved and the tasks are performed in FY 2004.</p> <p>NOTE: In most cases, the “Original Budget for Rescheduled Tasks” should match the “Proposed Budget for Rescheduled Tasks.”</p> <p>Rescheduling is <u>not</u> the appropriate process to request a budget increase for new or existing tasks, or to change the scope of your project. A budget increase or project scope change requires a Within-Year Modification Request (see http://www.cbfwa.org/files/province/fy03withinyear/default.htm).</p>	<p>Add up the costs of <u>all</u> work to be rescheduled from FY 2003 to FY 2004. Do not list the budget for each task in this section; you will be asked to break down costs by task in Section 3.</p> <p>The “Proposed Budget for Rescheduled Tasks” is different from the “Original Budget for Rescheduled Tasks.” If the budget has increased or decreased for some reason, explain in the comment field provided.</p>
Explanation or Additional Information	This comment field is to explain any difference between the “Original Budget for Rescheduled Tasks” and the “Proposed Budgets for Rescheduled Tasks,” or to provide any additional financial information the sponsor would like to be considered.	Since the rescheduling process may <u>not</u> be used to request additional funds, you must provide an explanation for any difference between original and proposed budgets. It may be that tasks will cost <i>less</i> if performed in FY 2004 than they would have in FY 2003 because of efficiency or savings that can be gained.

Section 3: Description of Tasks to be Rescheduled/Justification

To be filled out by the project sponsor/contractor

This section captures information about the work to be rescheduled.

Field	Description	Instructions
Task or Activity Description	This field is used to describe the unit of work proposed for rescheduling, based on the current Statement of Work for the project and/or contract.	Describe the work to be rescheduled in sufficient detail for BPA, the Council and CBFWA to understand the potential impacts of approving or denying the rescheduling request.
Original Start/End Dates	These are the dates the work was scheduled to begin and end, before the rescheduling request was made.	Please list the Day/Month/Year.
New Start/End Dates	These are the dates the work will begin and end if the rescheduling request is approved.	Please list the Day/Month/Year.
Condition/Situation Creating the Need to Reschedule	Examples include permitting delays, contracting delays, or unforeseeable events like natural disasters, staff turnover, etc.	Enter a reason for each task. If the reason for rescheduling is the same for each task, please copy and paste that reason into the cell for each task. Use this section, as well as the last field in this table (“What Will Enable the Work to be Achieved Now?”), to explain why the conditions that delayed the FY 2003 work are no longer an obstacle or can be overcome, allowing the work to go forward in FY 2004.
Cost	This is the cost for each of the tasks or activities to be rescheduled.	The cost for each task should be based on the most recent, approved Budget and Work Schedule for your project, <u>unless</u> you have identified some savings that may be gained from performing the work in FY 2004. If that is the case, use the revised

		cost for the work.
What Will Enable The Work To Be Achieved Now	<p>In order for rescheduling to be approved, a sponsor must be able to demonstrate that the tasks rescheduled from FY 2003 can be accomplished in FY 2004, <i>in addition to the work that was already planned for that fiscal year.</i></p> <p>This field provides the opportunity for sponsors/contractors to explain why the rescheduling request should be approved. Based on the definition of rescheduling, the work must still be feasible and valid in the future fiscal year. Without a clear indication of this, no funds should be moved to support it.</p>	<p>Use this field to demonstrate how each task can be completed in addition to work already scheduled for the year. The reason captured for one task may be referenced in others, if appropriate. Also, please explain why the work is still valid, i.e. timely, relevant, and consistent with the objectives envisioned by the original proposal.</p>

How to Submit Your Rescheduling Request:

Email your completed Rescheduling Request Form to mkkerr@bpa.gov, and cc (carbon copy) within-year@cbfwa.org and mfritsch@nwcouncil.org.

You may also **mail** your request to:
 Rescheduling Requests, KEW-4
 Bonneville Power Administration
 PO Box 3621
 Portland, OR 97208-3621

Or **fax** your request to BPA at: 503-230-4563. BPA will forward copies of faxed or mailed requests to the Council and CBFWA.

**END OF REQUESTOR'S PORTION OF FORM -- DO NOT FILL OUT SECTIONS 4 AND 5.
 THESE SECTIONS WILL BE COMPETED BY BPA.**