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# PERMANENT FINANCE PLAN and LIMITED DURATION PLAN REQUEST TRANSMITTAL CHECKLIST

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(use as first page in packet)

AGENCY NAME: \_\_\_\_\_ AGENCY NUMBER: \_\_\_\_\_  
SABR COORD: \_\_\_\_\_ PHONE NUMBER: \_\_\_\_\_  
DATE: \_\_\_\_\_

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**Please check the boxes below indicating required processes and documents are included with this Permanent/Limited Duration Finance Plan request.**

(During budget preparation periods, agencies should be mindful of using vacant positions on PFPs. Work with your BAM and LFO Analysts regarding a vacant position's status during budget prep prior to inclusion on a PFP.)

- Cover memo supporting the plan that addresses the following elements:**
  - Problem definition (what has changed since the Legislatively Adopted Budget was approved?)
  - Alternatives considered, such as reducing duties, working out of class, etc.
  - Proposed solution
  - Expected outcomes
  - How does this action fit with the agency's long-range, strategic staffing plan?
  - Are the positions proposed for demotion, elimination/abolishment, or reduction in months, vacant? (please provide explanation)
  - Are the positions being abolished vacant and if not vacant, please provide explanation.
  - What will the agency do if this permanent finance plan is not approved?
  
- Finance Plan**
  
- Position Classification Review(s)** *(only needed on reclassifications, establishments and abolishment's)*
  
- Organization Chart**
  
- DAS CHRO's Classification & Compensation Unit's authorization/ review memo** *(only needed on reclassifications, establishments and abolishment's)*