



OFFICE OF MANAGEMENT & BUDGET

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MEMORANDUM

To: Executive Branch CFOs
From: Joseph Codega Jr., State Budget Officer *John M. Codega Jr.*
Date: July 22, 2024
Subject: Documentation for Personnel Action Requests

This memo provides instructions and sets expectations for agency personnel using the Personnel Action Request System. Following the Director of Management and Budget's memorandum dated July 18, 2024, the Budget Office will implement enhanced controls on Executive Branch spending, including requiring additional review of all personnel requests.¹ Our goal is to proactively manage personnel expenditures in order to mitigate difficult and disruptive budget decisions in FY 2026.

Substantive Justification Required:

Agencies must provide a substantive justification of critical need for each personnel action requested. The justification should explain the value of the position and why it cannot be fulfilled in another way or delayed. Simply stating that a position is within budgeted authority is insufficient. This applies to all substantive personnel actions, including new positions, changes to existing positions, and backfills of existing positions. Oversight will apply to all positions, regardless of funding source.

Guiding Questions for Justification:

To assist with your justification, please address the following questions in the "Critical-Need-for-Position" field, or in the "Notes" tab if not already covered:

1. Is the position included in the FY 2025 personnel supplement and/or enacted budget? If not, how will the agency accommodate this position in a revenue-neutral manner?
2. Does this position generate significant revenue for the state or help sustain existing revenue or cost-saving initiatives?
3. Does this position involve direct interaction with the public, or is it primarily a back-office function?
4. Is this position in support of statutory mandate (e.g., compliance with federal or state statutes or a consent order)?
5. Is this position related to public health or safety?
6. What is the source of funding for this position? Is this source sustainable?
7. When did this position become vacant, and how have its duties been fulfilled since then? Why can't this coverage continue?

¹ [24.07.18 FY 2025 Discretionary Spending and Hiring Restrictions 2.pdf](#)

8. Are there other resources, including internal/existing, that can manage the responsibilities of this position?
9. What would be the impact of a significant delay in filling this position (e.g., 60, 90, or 120 days)?
10. Has the vacancy resulted in overtime or contractual work? If so, how will filling this position save on these costs, if at all?

Personnel requests that do not adequately address these questions will be returned to the agency. Thank you for your cooperation with these procedures. If you have any questions or concerns, or would like to provide additional documentation to support a personnel action request, please reach out to your assigned analyst contacts in the Budget Office.