

## **Wisconsin Partnership Program Grant Budget Revision Policy**

### **BACKGROUND**

The Wisconsin Partnership Program (WPP) Accountant and Program Officer work with grant recipients to establish an initial budget totaling no more than the award amount approved by the Oversight and Advisory Committee (OAC) and/or the Partnership Education and Research Committee (PERC). Grant budgets include the following expenditure categories: salary and fringe benefits, travel, services, and supplies and other expenses. Budgets for OAC community grants also include details on the proportion of funds by expenditure category allocated to either the community organization or to the University of Wisconsin (UW). It may be determined at any time during the grant period—by the Wisconsin Partnership Program (WPP) or by the grantee—that a budget revision is necessary to accomplish the aims of the grant.

### **POLICY**

Re-budgeting between major budget categories (salary and fringe benefits, travel, services, and supplies and other expenses) greater than or equal to ten percent of the total amount of award must be approved in advance by the WPP Accountant, in consultation with the designated Program Officer.

### **PROCEDURES**

Grantee requests to re-budget between major budget categories greater than or equal to ten percent of the total award must be submitted to the WPP Accountant in writing with an explanation of why the change is necessary, along with a list of the specific budget categories to change and by what amount. The Accountant will confirm funding availability before reviewing the request with the Program Officer who will advise on the appropriateness of the request based on the project work plan and overall project goals. If concerns are identified, the WPP Director is consulted before a final decision is made. Grantees will be notified of a decision within thirty days of submitting the request.

The notice of approval from the WPP Accountant will include a link to the budget forms which the grantee will use to update the grant budget on file with the WPP to reflect the approved changes. The changes will be reviewed by the Accountant upon submission by the grantee to ensure the changes align with the approval.

For OAC Community Grants, if the approved budget revision results in a change in the allocation of funding between the community organization and the UW, the WPP Accountant will submit an Encumbrance Management Form to SMPH Fiscal Affairs to adjust WISDM (UW System's financial reporting program). The change in the allocation of funding between the two entities will be recorded in the grant file, and may also require a change to an existing Inter-Institutional Agreement if the academic partner is from another UW System institution.