

## Program Budget Revision Procedure – 2022-2023

When an agency/organization receives funding from United Way of the Greater Chippewa Valley (UWGCV) for a program, the expectation is that the dollars will be used as proposed in the grant application that was approved by the UWGCV Board of Directors. However, UWGCV recognizes that a budget is part of an overall plan and things may change over time.

**Programs may submit budget revisions at any time throughout the year, but no later than 4:00 pm on May 5, 2023.** Please return as an **Excel document**. UWGCV staff will be in contact within 10 business days of the request.

### **Budget Revisions:**

- Variances of less than (+/-) 20% **AND** less than (+/-) \$500 in any **approved** line item do not need UWGCV approval.
- Grant funds are expected to be used for expenses in approved line items; however, a program may submit a request for approval to shift funds into new line items not previously identified.
- A clear rationale and justification must be provided for consideration of any budget revision(s).
- An electronic copy must be submitted by the deadline for consideration.

If deemed necessary, the agency/organization requesting the budget adjustment may be required to make a formal presentation and answer questions.

Each year a program must submit an Annual Progress Report to UWGCV that includes the budget and other financial documentation. If UWGCV has questions about the use of grant funds, additional documentation may be required from the agency/organization. If it is determined that grant funds were not used as indicated in the program budget, the funded agency/organization would be responsible to reimburse UWGCV for those amounts.

At completion of the UWGCV fiscal year, any **UNUSED** program funds must be returned by the agency/organization to UWGCV. Allowing a 30-day grace period to account for unpaid expenses, the unused amount is due to UWGCV by **August 4, 2023**.

If you have any questions, please contact the initiative director at the email below or at 715-834-5043.

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