Wisconsin Partnership Program
Grant Budget Revision Policy

BACKGROUND
The Wisconsin Partnership Program (WPP) Grants Specialist 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.

DEFINITIONS

Period of agreement: Period of time between the grant start date and the grant end date specified in the Memorandum of Understanding and Grant Agreement (MOU). If a no cost extension is granted by the Wisconsin Partnership Program, the period of agreement extends through the no cost extension end date.

Grant start date: Date specified in the MOU, usually the first day of the month, on or after which expenditures may be charged to the grant.

Grant end date: Date specified in the MOU, usually the last day of the month, after which expenditures may not be charged against the grant except to satisfy obligations incurred during the period of agreement.

POLICY
Budget revisions may be initiated by the WPP or by the grantee at any time during the period of agreement. However, grantees are required to submit a revised project budget for approval by the WPP if expenses between major budget categories (salary and fringe benefits, travel, services, and supplies and other expenses) change by ten percent or more of the total amount of award.

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 Grants Specialist 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 Grants Specialist 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.

Grantees will receive a notice of approval from the Assistant Director for Finance, which will include the budget forms that the grantee is to use to update the grant budget on file with the WPP to reflect the approved changes. The changes will be reviewed by the Grants Specialist 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 Grants Specialist will submit an Encumbrance Management Form to SMPH Fiscal Affairs to adjust WISDM (UW System’s financial reporting program).

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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.