

## GLOW WORKFORCE DEVELOPMENT BOARD POLICY

**NAME OF POLICY:** GLOW WDB Budget Amendment Request Policy

**APPROVAL DATE:** 5/16/17, 3/20/2018, 1/15/2019

**EFFECTIVE DATE:** January 15, 2019

---

### **Purpose:**

After overall budgets are approved by the WDB, any change in funding between individual budget lines requires a budget modification to be submitted and approved by the WDB. This policy provides for a method to move budget funds occasionally as required due to unforeseen program changes or other reasons. This policy will identify the process in GLOW to complete a budget modification for both contractors and county budgeted funds.

### **Definitions:**

**Wages & Fringe:** Employee salaries and benefits.

**Operational Expenses:** Expenses needed to operate the agency such as rent, utilities, insurance, copying, supplies, etc.

**Participant Expenses:** Expenses that are used for participants in the programs. These expenses are tuition, supportive services, work experience, On the Job Training and Customized Training. The WDB budget includes the amount reserved for these costs until training proposals are submitted to the WDB Executive Director for approval. The WDB Director approves the training proposal and a transfer of funds from the WDB budget to the subrecipient budgets. On a quarterly basis, budget transfers will then be reported to the Finance Committee and presented to the GLOW WDB for a vote to approve the budget modifications per WIOA § 679.370. This quarterly vote allows members to be aware of the transfers made and the amount of trainings that are being approved.

### **Policy:**

1. Budget modification of funds within one of the three defined categories (Wage & Fringe, Operational Expenses and Participant Expenses) is permitted without approval of the WDB. However, notification of the change must be given to the WDB Manager and Grant Recipient using the attached amendment form.
2. Budget modification of funds from one of the three defined categories (Wage & Fringe, Operational Expenses and Participant Expenses) to one of the other categories requires approval from the WDB. In other words, movement of any funds from one budget line to another requires WDB approval.

### **Process:**

- The GLOW WDB Budget Modification Form (attached) should be completed for all requests.
- All requests for Budget Modification should be sent to the Grant Recipient & the WDB Manager.
- **Once the Budget Modification is approved, the Subrecipient is required to submit the detailed breakdown of each category in the budget Staff W/F, Rent Utility Maint., Other Operational, and Participant W/F, ITA, OJT, Customized, Support) to the Grant Recipient by the last business day of that month.**
- Modification requests may take up to 90 days to process.

**GLOW WDB BUDGET MODIFICATION FORM**  
**(Submit for All Changes to WDB and GR)**

Entity Name: \_\_\_\_\_ Today's Date: \_\_\_\_\_

Funding Category: Adult: \_\_\_\_\_ DLW: \_\_\_\_\_ Youth: \_\_\_\_\_

<b>Cost Category</b>	<b>Original Budget</b>	<b>Adjustment Amount</b>	<b>Revised Budget</b>
Wage & Fringe			
Operational Expenses			
Participant Expenses			
<b>Total</b>			

Explanation for modification of funds (describe changes/reason for modification request):

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

Budget Modification Requested By: Print Name: \_\_\_\_\_

Signature: \_\_\_\_\_

Title: \_\_\_\_\_

\*\*\*\*\*  
**WDB OFFICE USE ONLY:**

WDB Approval Required per Policy (moving funds from one of the three defined categories: Wage & Fringe, Operational, Participant)  Yes  No

Authorized by: Print Name: \_\_\_\_\_ Title: \_\_\_\_\_

Signature: \_\_\_\_\_ Date: \_\_\_\_\_

Grant Recipient Print Name: \_\_\_\_\_ Title: \_\_\_\_\_

Authorized Signature: \_\_\_\_\_ Date: \_\_\_\_\_

Modified Budget Effective Date: \_\_\_\_\_

**Attachments:** WDB Minutes must be attached to verify board action was taken to approve the modification if required