



## Guidelines for Budget Amendments

The following table is intended to help answer questions about when to request a GEAR UP Iowa Budget Amendment.

GEAR UP Iowa Budget Amendments	
Reason for Amendment	Example
Adding a Service or Activity	<ul style="list-style-type: none"> <li>• Campus visits were not part of the original budget and they need to be added mid-year</li> <li>• The district/school decided to hire a GEAR UP Advisor after the budget was approved without the position</li> </ul>
Changing a Service and/or Moving Funds from One Category to Another	<ul style="list-style-type: none"> <li>• Tutoring attendance is lower than expected and the tutoring budget will not be fully spent</li> <li>• The summer school program will cost more than expected so funds need to be added to the budget line</li> <li>• Moving \$1,000 from the "Salaries &amp; Wages" category to the "Materials &amp; Supplies" category</li> </ul>
Deleting a Budget Line	<ul style="list-style-type: none"> <li>• A budgeted cultural trip to visit a museum has been cancelled</li> <li>• A career fair budgeted for the current year has been rescheduled for the following year</li> </ul>

### **Additional Information:**

- Planning Teams must approve significant (more than \$1000) changes to the budget. If a Planning Team meeting has not been scheduled yet, please contact members via email and request feedback and/or approval from the majority of the Planning Team.
  - Please retain this approval in your file.
- It is not necessary to make an amendment for budget changes totaling less than \$500 as long as the change is within the same budget category.
  - For example: You have \$300 left in budgeted office supplies and want to use it for tutoring materials. Both budget lines are within the Materials and Supplies category so no amendment would be required.
- Please contact the GEAR UP Iowa Facilitator anytime you are unsure if an amendment needs to be made.