

# WA State GEAR UP Work Plan & Budget Revision Request Form



## When Is A Plan/Budget Revision Request Required?

1. **Are you ADDING a new activity to your GEAR UP plan?** Yes, it is required EVEN WHEN a new activity entails no additional funds. WSAC uses these up-to-date work plans and budgets to monitor progress and ensure compliance.
2. **Are you DELETING an activity from your GEAR UP plan?** Yes, it is required, EVEN WHEN the deleted activity does not have funding attached. WSAC uses these up-to-date work plans and budgets to monitor progress and ensure compliance.
3. **Did you spend more on a planned activity than you had budgeted?** Not necessarily. It is NOT required if you:
  - A) Have enough funding to cover the overage from underspending on other items (s), etc., AND IF
  - B) Are not deleting an activity to cover the overage. It's called "managing your overs and unders."
4. **Did you spend less on a planned activity than you had budgeted?** No, it is NOT NECESSARILY required unless you add a new activity with the extra funds (see item 1 above).

### NOTES:

1. The Work Plan and Budget are a contractual agreement. Any revisions must be pre-approved.
2. You may submit revisions up to four times a year: September 30, December 31, March 31, and June 30.
3. All "To Be Determined" funds must be budgeted by December 31.
4. Approved revisions will be emailed to the GEAR UP Advisor and Building Administrator within ten business days.

### TO SUBMIT:

1. The building principal or designated administrator must sign the form for approval.
2. Submit this form via Box.

|                    |  |                     |  |
|--------------------|--|---------------------|--|
| <b>Staff Name:</b> |  | <b>School Name:</b> |  |
|--------------------|--|---------------------|--|

**1. Add New Activities.**

**NOTE:** Please complete a separate line for each new activity listed. Insert additional lines if needed.

| A  | B                                  | C   | D                                       | E   | F   | G                   | H            | I                | J              | K                                      |
|--|------------------------------------|---|---|---|---|---------------------|--------------|------------------|----------------|--|
| Target Date for Activity                     | Activity Name:<br>For Portal Entry | Describe how you will provide the support so that the objective is met. Include grade level and estimated # students. | Service Delivery Type:<br>Group/<br>1:1 | Delivery Mode:<br>Direct Service<br>Virtual<br>Synchronous<br>Virtual<br>Asynchronous | Describe the Anticipated Expenditures for this Activity | Salaries & Benefits | Staff Travel | Goods & Services | Transportation | TOTAL for this Activity (Columns G: J) |
|  |                                    |   |   |   |   | \$<br>-             | \$<br>-      | \$<br>-          | \$ -           | \$<br>-                                |
|  |                                    |   |   |   |   | \$<br>-             | \$<br>-      | \$<br>-          | \$ -           | \$<br>-                                |
|  |                                    |   |   |   |   | \$<br>-             | \$<br>-      | \$<br>-          | \$ -           | \$<br>-                                |
| <b>Total Requested Funds In This Section</b> |                                    |   |   |   |   | \$<br>-             | \$<br>-      | \$<br>-          | \$ -           | \$<br>-                                |

**2. Delete Activities.**

- The following information is for any activity you are deleting from your currently approved work plan and budget list—you will not be providing the service or activity during the current year.
- Please copy the information into the table below so that it is identical to the information in your work plan and budget.

| A  | B                                  |   | D                                       | E   | F   | G                   | H            | I                | J              | K                                      |
|--|------------------------------------|---|---|---|---|---------------------|--------------|------------------|----------------|--|
| Target Date for Activity                   | Activity Name:<br>For Portal Entry | Describe how you will provide the support so that the objective is met. Include grade level and estimated # students. | Service Delivery Type:<br><br>Group 1:1 | Delivery Mode:<br>Direct Service<br>Virtual<br>Synchronous<br>Virtual<br>Asynchronous | Describe the Anticipated Expenditures for this Activity | Salaries & Benefits | Staff Travel | Goods & Services | Transportation | TOTAL for this Activity (Columns G: J) |
|  |                                    |   |   |   |   | \$<br>-             | \$<br>-      | \$<br>-          | \$ -           | \$<br>-                                |
|  |                                    |   |   |   |   |                     |              |                  |                |  |
|  |                                    |   |   |   |   |                     |              |                  |                |  |
| <b>Total Funds Deleted In This Section</b> |                                    |   |   |   |   |                     |              |                  |                |  |

**3. Revise Activities.**

- From the current Work Plan and Budget, copy Columns A, B, and C.
- In Columns D through I, fill in the proposed changes per the column headers.

| A  | B                                  | C   | D   | E   | F                   | G            | H                | I              | J                             |
|--|------------------------------------|---|---|---|---------------------|--------------|------------------|----------------|-------------------------------|
| Target Date for Activity   | Activity Name:<br>For Portal Entry | Describe how you will provide the support so that the objective is met. Include grade level and estimated # students. | If the activity description is being revised, write a new description here. | If the budget is being revised, describe the anticipated expenditures here. | Salaries & Benefits | Staff Travel | Goods & Services | Transportation | TOTAL funds for this Activity |
|  |                                    |   |   |   | \$<br>-             | \$<br>-      | \$<br>-          | \$ -           | \$<br>-                       |
|  |                                    |   |   |   | \$<br>-             | \$<br>-      | \$<br>-          | \$ -           | \$<br>-                       |
|  |                                    |   |   |   | \$<br>-             | \$<br>-      | \$<br>-          | \$ -           | \$<br>-                       |
| <b>Total Funds Added Or Deleted In This Section (Net Change)</b> |                                    |   |   |   | \$<br>-             | \$<br>-      | \$<br>-          | \$ -           | \$<br>-                       |

**4. Summarize Budget Revision**

|  |  |
|--|--|
| <b>Total Funds Added in Section 1.</b>   |  |
| <b>Total Funds Deleted in Section 2.</b>   |  |
| <b>Total Funds Added or Deleted in Section 3.</b>                                  |  |
| <b>Net Change (Section 1-Section 2+/- Section 3<br/>It should be equal to \$0.</b> |  |

**5. Administrator Approval Required:**

- The building administrator must sign this form (principal, assistant principal, etc.)

*My signature below acknowledges my approval of the above revisions to the GEAR UP Work Plan and Budget. I understand that all revisions are subject to review and approval by the WSAC GEAR UP Budget Analyst and Associate Director and that no expenditures as revised are allowable until approval is received. I understand that all changes become part of the revised contractual agreement with the Washington Student Achievement Council and are subject to all the GEAR UP rules and guidance.*

**Printed Name:**

**Title:**

**Signature:**

**Date:**