

UWEC 910.A, Funding Charter Process

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Procedure #: UWEC 910.A

Intent

The Funding Charter process was established document and decision requests for central funding sources. This procedure supports [UWEC 910, Fiscal Administration](#) and aims to explain the process for submitting a Funding Charter request and administering an approved project or initiative.

Scope

No funds should be spent or committed prior to the issuance of the Funding Charter approval.

A Funding Charter authorizes funding and not the authority to make personnel changes of any kind. If the project funding includes salary expenses, all Unit, Division and UW-Eau Claire Human Resource processes and approvals must be completed before a funding transfer is completed.

Appropriate approval must be obtained if purchase orders and contracts are required.

Definitions

Central funds: budget funds managed by the Chancellor and Executive team for campus wide initiatives and strategic investments

Funding Charter: a written approval granting central funds for an initiative or project

Procedures

- Submitting a Funding Charter Request
- Follow-up for Approved Funding Charters
- Amending an Approved Funding Charter

Submitting a Funding Charter Request

Step	Action
1.	Develop and refine your Funding Charter idea by discussing with your supervisor and examining funding sources outside of central funds
2.	Complete and submit a Funding Charter Form .

Step	Action
3.	The request will route through various approval stages specific to the elections made in the form. Once a decision is entered, the requestor will receive an email with the decision.
4.	<p>If approved the requestor will receive a request for funding through the eform, then continue with the steps under Follow-up for Approved Funding Charters below</p> <p>If denied work with your supervisor to determine if the request should be changed, refined, funded by other sources, or resubmitted at a future date.</p>

Follow-up for Approved Funding Charters

Work with your supervisor to establish launch and milestone dates for outcomes. Work with your Divisional leadership to establish quarterly review meetings to discuss:

- Project progress,
- Confidence level of completion,
- Spend of the allocated budget, and
- Next steps if the project has changed or is no longer applicable.

Quarterly meetings should include:

- Divisional leader (Executive Staff member)
- Dean or Director
- Vice Chancellor for Finance and Administration
- Budget Officer

Amending an Approved Funding Charter

Complete and submit a new [Funding Charter Form](#). Select **Scope Amendment** for the *Scope* line of the *Project Budget & Funding* section. The form will route for approval.

Resources

[Practice Directive UWEC 910, Fiscal Administration](#)

[Funding Charter Form](#)

[Budget & Resource Planning SharePoint site](#)

Procedure Administration

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Division	Finance & Administration
Department	Budget and Resource Planning
Contact	Budget Officer finadmin@uwec.edu

Revision History

Version	Revision Date	Description of Change	Author(s)
1.0	September 1, 2022	Initial issuance	Tracy Drier