Approving **The Budget**



Once the budget is completed, the membership will need to vote on a motion to approve the proposed budget or an amended version of what was proposed. Make sure the Local AGM minutes include the motion wording, the name of the person making the motion, and whether the motion passed/carried. The motion must be seconded. **This process is found in Funding 13.**

Motion

The motion to approve the budget needs to be made by someone other than the meeting Chair. The motion can be as simple as "I move we adopt the budget." The motion must have someone "second" it. Once it is moved and seconded, the budget is now open for amendments. Amendments should be made individually to keep things simple and should be recorded in the minutes. Each amendment should have its own vote, and the vote should be recorded in the minutes so that the Treasurer can use the minutes to make the approved changes to the budget prior to submission. Once there are no more amendments to be voted on and no other questions or comments, the main motion - to adopt the budget - can be voted on. It needs a simple majority to pass.

Attaching Documents

Before submitting the budget in DMS, attach the meeting minutes for the meeting where the budget was approved near the bottom of the form. You can attach other relevant documents that might assist in managing finances throughout the year. Centralized Accounting will also be able to view these documents.

Submitting the Budget

Once your budget has been approved and any documents have been attached, go to the bottom of the form and enter the date of the Local AGM, the name of the person who made the motion to approve the budget, and the wording of the motion. Once your budget has been voted on and passed, and these sections have been entered, the budget can be submitted. Now, the budget form can no longer be changed or edited. It can be viewed at any time by any Local Executive member.

Unanticipated **Expenditures**



Any expenses that were unanticipated and/or are outside or over the amount approved in the budget need an additional motion. For example, if the Local budget did not include funds for a Nurses' Week event but the Local decides to hold one, a motion at a Local meeting must be made to allocate funds to that event. The motion must be seconded and must pass. After the Local meeting, send the meeting minutes to Centralized Accounting. Generally, making a motion at a Local meeting for large expenditures, even within the scope of the budget, is best practice.