

CARRYOVER REQUEST

In the event that research is delayed, a carryover of unexpended funds in a budget period can be requested for use in the next budget period, if greater than 30% of the available budget period funds. If the reported unexpended funds are 30% or less, carryover is automatic and does not need Foundation approval.

Multiple carryovers may be considered but must be requested and approved. A request is not a guarantee for Foundation approval.

Please ensure that both scientific and financial reports have been uploaded into proposalCentral before submitting a no cost extension request, as a request will not be considered for awards with outstanding items.

The requestor should send a formal letter on institutional letterhead, with the following information and attachments:

- Award number
- Project Title
- Principal Investigator
- Projected amount of unexpended funds
- Brief explanation as to why the project has been delayed
- Brief description of what the PI expects to accomplish with the funds carried forwarded, into the next budget period.

The letter should be accompanied with a financial report showing the award expenditures and account balance at the budget period end date.

The request should be signed by both the PI and their institutional signing official. If it is a fellowship, the mentor needs to be an additional countersigner.

When the required documents are finalized for submission, upload all these documents in proposalCENTRAL. Upon logging in, click the “Awards” tab and select your project. You would be able to upload these documents in the “Deliverable” section by selecting the “Add Deliverable” button. Please upload the contents as a single rolling document. When adding, select “Other” for the Deliverable Type and type in “Carryover Request” for the Deliverable Type Description.