

Guidelines for requesting carryover balance (cob) of funds

Unobligated balances of funds at the end of a budget period can be carried forward into the current budget period if properly justified. Carryover of funds can only be used to complete activities that were not completed in the budget period that funds were originally awarded. The following is a list of items that need to be included in a carryover request.

1. detailed description of the objectives/goals not completed
2. explanation as to why the objectives/goals were not completed
3. explanation of how the unmet objectives/goals will be met in the subsequent year
4. explanation regarding the impact to the project should the request be denied
5. detailed budget and budget justification that supports the work to be completed and the proportionate non-Federal share (25%)
6. copy of the current indirect cost rate agreement, if charging indirect in the carry over
7. Original copy of the SF424 signed by the authorizing representative*
8. SF424A*

In addition, IF the person who has authorizing signature responsibilities for your grant has changed since you last submitted paperwork to ADD, include an official letter from the University/designated entity that states that this change has taken place.

All carry over requests must be submitted on official University/designated entity letter head.

* new requirement for carry over request