Wisconsin Partnership Program
Carryover Request Policy

BACKGROUND
As indicated in the Memorandum of Understanding and Grant Agreement (MOU) between the Wisconsin Partnership Program (WPP) and the grant recipient, awarded funds are expected to be expended within the approved period of agreement in alignment with the approved budget.

DEFINITIONS
Carryover: process in which unobligated funds remain at the end of a grant year are carried forward to be used within the following grant year.

Unobligated funds: annual budget funding remaining at the end of the grant year. The unobligated balance is calculated by subtracting annual expenses paid and expenses incurred but not yet paid from the annual budget amount. Obligations do not include planned or designated activities where a service has yet to be provided or a good has not been received.

POLICY
Generally, Recipients may automatically carryover unobligated funds from year to year within the same award. There are two types of awards with carryover restrictions:

Strategic grants (awarded after January 1, 2022): Recipients may automatically carryover up to 15 percent of the annual budgeted amount in unobligated budget funds from year to year within the same award.

Community Impact grants (awarded after January 1, 2022): The Recipient may automatically carry forward up to 30 percent of the total award in unobligated annual budget funds from year to year.

Recipients of Strategic or Community Impact grants may submit a written request to carryover unobligated funds over their respective cap at the end of each grant year. Approvals are rare and Recipients must clearly justify why the carryover of funds is essential to complete the original scope of work. Requests to carryover unobligated funds that exist due to administrative errors will not be considered. If a pattern of underspending is noted, WPP will assume the award is overfunded and the request will not be considered.

Carryover requests require approval by the WPP Administrative Leadership Team (Executive Director, Administrative Director, and Associate Directors for Finance and Operations), in consultation with the lead Program Officer. Decisions by the WPP Administrative Leadership Team to approve a request in full or in part, or to reject a request are final and may not be appealed.

Recipients will not be able to carryover unspent budget funds from one award to another.

PROCEDURES
Strategic or Community Impact grant recipients shall submit annual carryover requests greater than the respective cap within their annual progress report in Fluxx. Requests must include the carryover amount, a thorough justification for the request, along with a revised budget and budget justification that outlines in detail how the unobligated funds will be used within the next grant year. Recipients will be notified of a decision within 30 days of receipt of the request by letter from the WPP Executive Director. Recipients may not deviate grant spending from their approved annual budget until formal notice has been granted.

Effective 5/15/23