TEXAS ACCESS to JUSTICE FOUNDATION

MEMORANDUM

To: All TAJF Grantees Receiving IOLTA, BCLS, BCLS-VW, LASSA, & LAV

From: Jonathan W. Vickery, Associate Director & Director of Grants

Re: Carryover Request GY 17-18 Projected Unspent Grant Funds

Date: April 9, 2018

It is getting near the time for grantees receiving **IOLTA, BCLS, BCLS-VW, LASSA & LAV**[1] funds to examine your projected expenses and expenditures of awarded grant funds for the remaining grant year to determine if you will have spent your entire GY 2017-2018 grant award by the end of the grant year (August 31, 2018). If you project or anticipate unspent grant funds by the end of the grant cycle, you may consider asking permission to carry over unspent funds past the grant duration. Please carefully review your General Grant Provision Article XI "Carryover" prior to submitting any such request. This provision applies to all of the above grant programs.

This policy (see attached) allows grantees to request an amount up to 10% of grantee's current grant(s) to be carried over, with appropriate written explanation, for a limited time beyond the subsequent grant year upon staff approval. Carryover requests exceeding 10% up to the maximum 25% of the grant amount requires extraordinary circumstances with written explanation and have the Executive Director's approval. If you have more than one grant, a separate carryover request is needed for each grant.

Carryover approvals are not automatic and TAJF reserves the right to decline such request.

The deadline for any carryover requests is **June 15, 2018**. Attached also are instructions on how to submit request through WebGrants.

While your request must be timely, you should schedule any request at a point prudent when you can gauge as realistic as possible what you believe will be projected unspent funds by the grant's end date. Unspent funds not requested timely or approved to be carried over will be refunded to the foundation or Texas Supreme Court depending upon the fund source

CVCLS funds may not be carried over.

If you have any questions, please feel free to contact the Program Officer assigned to your grant or Jeanine Lisa with questions pertaining to WebGrants.

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[1] Interest on Lawyers Trust Account, Basic Civil Legal Services, Basic Civil Legal Services-Volkswagen, Legal Aid for Survivors of Sexual Assault & Legal Aid for Veterans.

TEXAS ACCESS to JUSTICE FOUNDATION

ARTICLE XI

CARRYOVER

11.01 ORDINARY CARRYOVER

An amount up to 10% or a Grantee's current Grant may be carried over to the subsequent grant year upon approval by the Foundation. A Grantee requesting a Carryover must submit a budget and Budget Narrative showing how such funds will be used by the Grantee in the first six months of the next Grant Period.

11.02 EXTRAORDINARY CARRYOVER

In unusual circumstances, the Foundation may approve a carryover of a maximum of 25% of a Grantee's current Grant. A Grantee requesting such a Carryover must submit a timely written request setting forth the unusual and extraordinary circumstances that have resulted in a projected under-expenditure of the Grant accompanied by a Proposed Budget and Budget Narrative showing how such funds will be used by the Grantee in the first six months of the next Grant Period.

11.03 DISCLAIMER

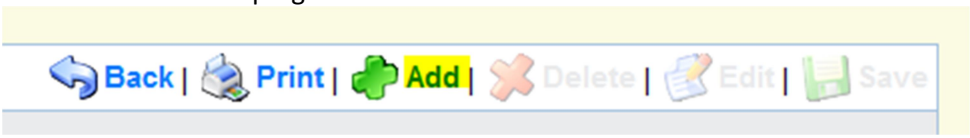
Neither the issuance of this policy nor the acceptance of a carryover plan shall be construed as a commitment by the Foundation to award funds in the next Grant Period to any current Grantee. Where a Grantee is not awarded a Grant for the next Grant Period, previously approved carryover funds may be used in accordance with a plan and budget approved by the Foundation to promptly close out matters previously undertaken with Grant funds. Unused Grant funds shall be returned to the Foundation promptly.

Instructions for Submitting a Request to Carry Over Funds

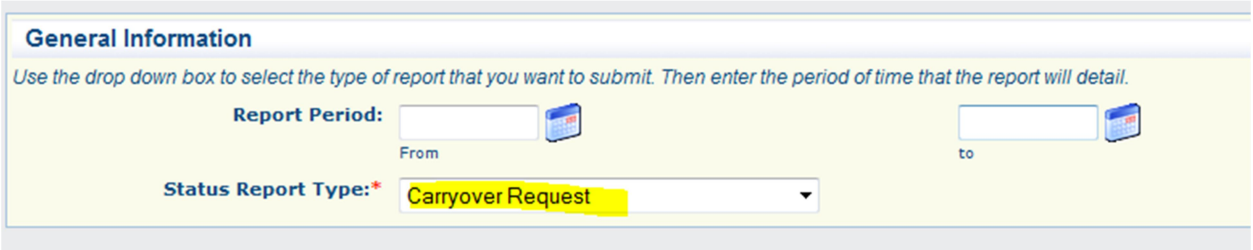
From the *Main Menu,* Select *My Grants.*

Select the appropriate grant and chose *Status Reports* from the list of Grant Components.

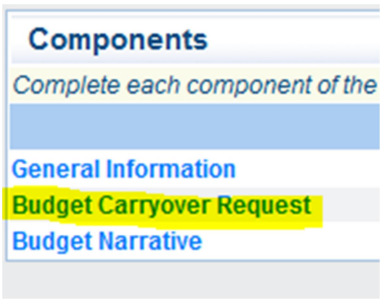
Select *+Add* at the top right.



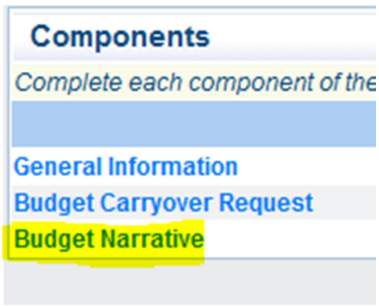
From the dropdown list for *Status Report Type,* choose **Carryover Request.** You do not need to select a report period since this is a request.



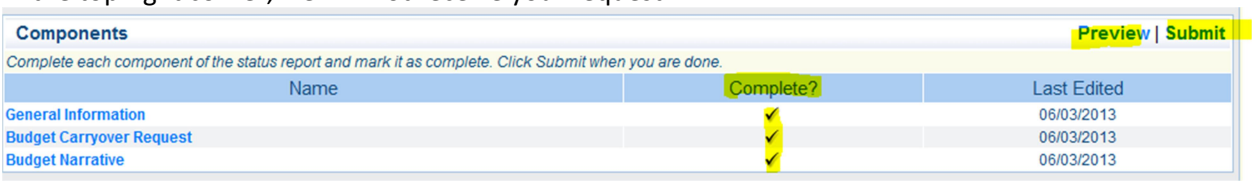
If needed, select *Return to Components* choose *Budget Carryover Request* to input approved budget along with the amount you request to carryover per line item. Be sure to hit *Save* in the top right corner.



Next, you will select *Budget Narrative* and complete. WebGrants requires you to input something into each field. If the field does not apply to you, simply type *NA.*



Once you complete all components, make sure their marked as complete in order to submit your form. Find the *Mark as Complete* button at the top of each form.

Row	Original Approved Program Budget	Requested Program Carry Over	Original Approved Administrative Budget	Proposed Administrative Carry Over	Original Approved Budget	Proposed Carryover Budget
Personnel						
FTE Lawyers	$100,000.00	$20,000.00	$0.00	$0.00	$100,000.00	$20,000.00
FTE Paralegals	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00
FTE Others	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00

From the list of components, you can preview and submit your request. Please note, you cannot submit your request without checkmarks in the *Complete* column for each component. If you do not hit *Submit* in the top right corner, we will not receive your request.