



EXTENSION AND/OR REALLOCATION REQUEST FORM

This form should be used by grantees wishing to extend the original end date of their grant and/or to reallocate funds between budget categories. **Please consult with program staff prior to submitting this form and accompanying documentation.**

Requested Modification: **Extension** **Reallocation**

Organization Legal Name:

Program Staff Member Consulted:

Grant Amount: Reference #:

Current Remaining Balance: As of:
(Including Interest Earned) (MM/DD/YY)

Complete If Requesting an Extension

Original Grant End Date:

Requested Grant End Date:

Select the primary reason that unexpended funds remain:

Specify reason if "Other":

Complete If Requesting a Reallocation

| FROM | | TO | |
|------------------|--------|------------------|--------|
| Budget Line Item | Amount | Budget Line Item | Amount |
| (1) | | (1) | |
| (2) | | (2) | |
| (3) | | (3) | |
| (4) | | (4) | |
| (5) | | (5) | |
| (6) | | (6) | |
| (7) | | (7) | |
| Total: | | Total: | |

Would the proposed reallocation create any new budget lines? Yes No

As of 11/2/2016

Checklist of Required Documentation:

- This **Extension and/or Reallocation Request Form** completed.
- A **written request** from the principal investigator or other relevant official at your institution, describing (i) the reason that funds cannot be spent as originally proposed and (ii) the extent of the proposed modification.
- A **financial report**, using the Foundation's "Budget and Financial Report" template (or "Revised Budget and Financial Report" template for previously modified grants), indicating the current balance of remaining funds, an accounting of any interest earned, and expenditures to date.
- A **revised budget** using the Foundation's "[Revised Budget and Financial Report](#)" template, detailing proposed modifications to the budget going forward.