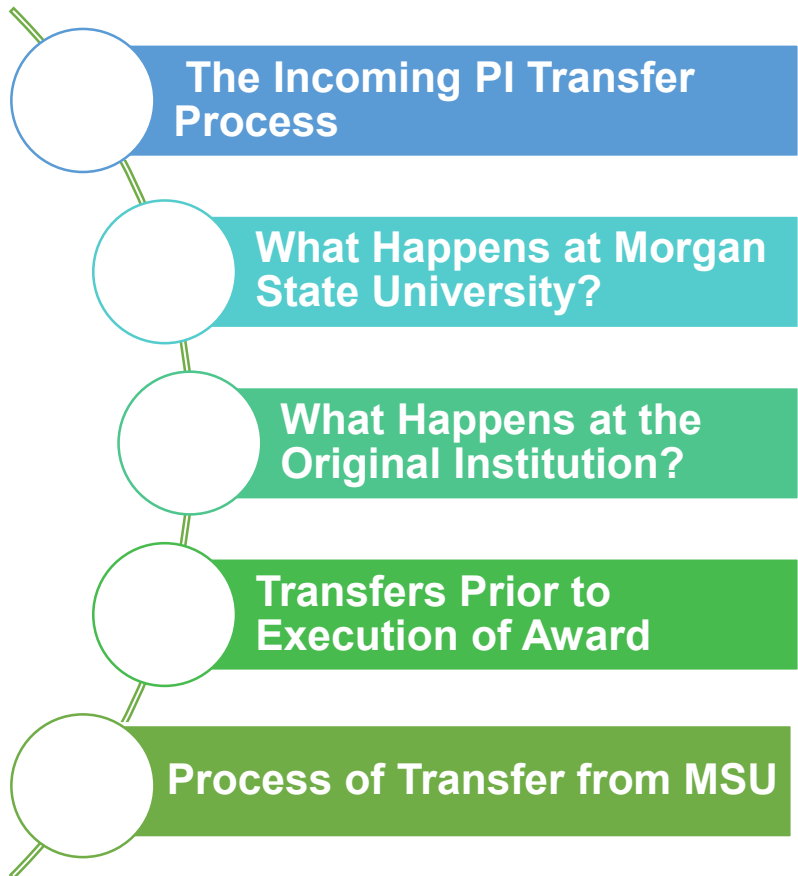


Transferring Grants and Contracts to and from Morgan State University

- **Ailing Zhang, MS**
- **October 12, 2022**



Agenda



The Incoming PI Transfer Process



PI Informs institutions of desire to transfer the project to Morgan State University (MSU)



Original Institution Approves



Sponsor is notified by original institution



PI & institution completed agency's forms



PI inform MSU that agency and sponsor approve of transfer



MSU completes PI transfer application for award



Awarding agency re-award the projects to MSU

The Incoming PI Transfer Process

What Happens at Morgan State University?

Establish the PI in the Morgan database (Internal Routing form must be fully routed)

Contact Ms. Ailing Zhang to request to register PI in electronic systems

Notify the ORA Pre-Award Team of the PI's date of arrival and the project he/she wishes to transfer to MSU

Receive assurance of acceptance of award from MSU

The Incoming PI Transfer Process

What Happens at the Original Institution?

- PI informs the original institution that he/she is leaving and wants to transfer the project to MSU
- PI contacts agencies for procedures to transfer awards to MSU.
- PI obtains approval from the original institution to transfer awards.
- Sponsor is notified by original institution of the PI's plans and the original institution's willingness to transfer the awards. Sponsors generally allow Change of Grantee Organization notices when:
 - a. Original grantee institution agrees to relinquish award before award expiration
 - b. Change of grantee institution is made before anticipated start date at MSU

Transferring of Existing Awards to MSU

- **Relinquishing documents**
- **History of Award**
 - **Original Notice of Award**
 - **Subsequent NOAS**
- **Current balance and balance anticipated at end of faculty appointment**
- **IRB information and documents**
- **Sub-awardee information**



Transferring of Existing Awards to MSU with a subawards

- **Treat as a new proposal**
- **Negotiate if necessary**
 - **Subrecipient monitoring form**
 - **Budget and budget justification**
 - **Statement of work**
 - **Start and end date**
- **Present PI as Morgan faculty or researchers, no longer theirs**



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Transfers Prior to Execution of Award

- **If an award has not been made to the original institution, but the PI has received the intent to fund, the program officer will likely handle the transfer “behind the scenes” by processing the award transfer manually.**
- **In this case, MSU may be asked to complete a cover page and/or other forms to be emailed to the program officer along with the budget information. Just as with any project, an internal routing form will be routed for approval.**
- **Remember that the original institution may need extra time to complete the relinquishment request.**

Transfers from Morgan

PIs are largely responsible for the award-transfer process, and must:

- **Initiate the process in a timely manner by working with the Office of Research Administration to complete a PI Departure, request for grant transfer form**
- **Arrange to subcontract a portion of the funded work, when applicable, to Morgan**
- **Address the issue of continued support of any Morgan graduate students and postdoctoral fellows supported under the project**
- **Request transfer of associated equipment purchased under the award or provided by the sponsor**
- **Arrange for the new institution to assume any cost-sharing obligations.**
- **Complete final reports to close the project at Morgan.**
- **Ensure the transfer is completed in accordance with all applicable federal, university, and sponsor regulations.**

Tips for Successful Transfer a grant

- **In order to avoid problems with the transfers to and from MSU:**
 - **Communicate early and often**
 - **Understand the sponsor's transfer process**



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Questions?

THANK YOU

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