

PI Transfer
~ what you need to know ~
NANO
November 15, 2006
IOWA STATE UNIVERSITY
OF SCIENCE AND TECHNOLOGY

Welcome

PI Transfer

What is a PI Transfer

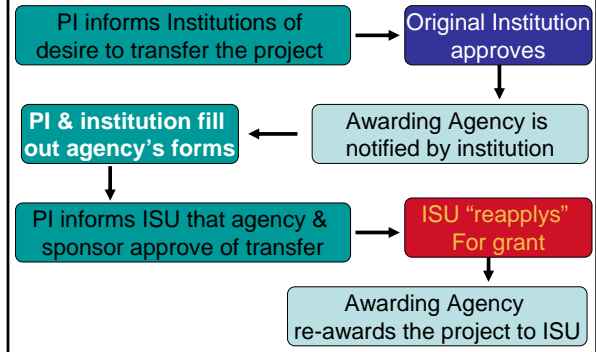
Process

Common Questions & Concerns

PI Transfer

When a PI leaves an institution to begin employment at ISU prior to the conclusion of a funded project and seeks to transfer the project to ISU

PI Transfer



PI Transfer

PI informs Institutions of desire to transfer the project

PI Transfer

- Once a new faculty member is hired the department needs to notify the OSPA Awards team of :
 - Start Date
 - Projects
 - Proposals
- Submit through ISU

PI Transfer

PI informs Institutions of desire to transfer the project

PI Transfer

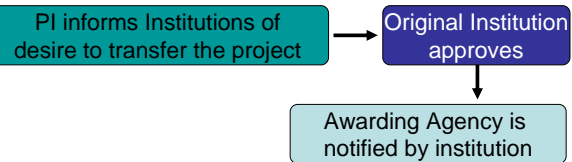
Why do PIs need approval to transfer a grant?

- Grants are awarded to grantee institutions
- Grantee institution has legal and administrative oversight

PI Transfer

- Rare occurrences where approval might not be granted from institution
 - Equipment grants
 - Multi-investigator projects
 - Center awards
 - Timing

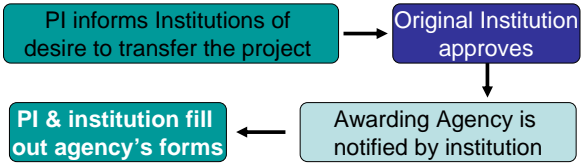
PI Transfer



PI Transfer

- Awarding Agencies generally allows Change of Grantee Organization when:
- Original grantee agrees to relinquish
 - Change of grantee organization is made before anticipated start date at new institution

PI Transfer

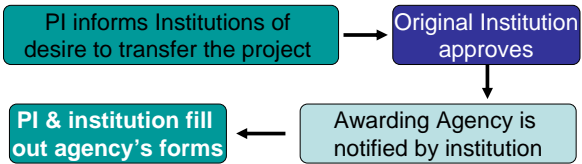


PI Transfer

NIH Forms

1. Original Grantee
 - Submits Relinquishing Statement
2. NIH
 - Sends Revised Notice of Grant Award (NGA)
3. New Grantee
 - Receives a NGA reflecting balance on Relinquishing Statement

PI Transfer

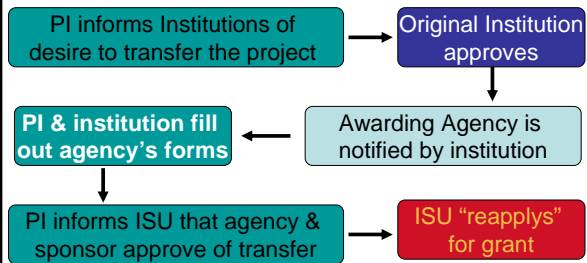


<https://www.fastlane.nsf.gov/fastlane.jsp>

PI Transfer

- NSF Demo
- Log in
- Award & reporting functions
- Notifications & requests
- First #
- Prepare new
- PI Transfer
- View transfer request
- PI transfer

PI Transfer



PI Transfer

- Re-Apply?
- GoldSheet
 - Signatures
 - Updated Budget & Justification

New website: [Introduction to Sponsored Funding for Principal Investigators](#)

PI Transfer

How Do You Handle F&A?

- Budgeted F&A
 - If ISU's rate is higher, the project will receive the original grantee's rate for the remainder of budget period; out years will have corrected rate. If ISU's rate is lower, the difference will be restricted.
- F&A on subcontracts
 - If subcontracts are issued for ISU to original grantee, available direct costs will be reduced by the sub's direct costs and F&A

PI Transfer

Transfers can get complicated

- End date vs State date
- Billing cycles

PI Transfer

Transfers can get complicated - Tips

- Talk to the PI early on
- Learn the Sponsor's Policies & Procedures
- Work Closely with OSPA

Thank You

Grant Coordinator Meeting
Thursday @ 1:15

Questions?
Comments?
Topic Suggestions?

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