Grant Transfers from One Institution to Another Institution

Effective January 2020

JSMF allows grant transfers between qualified institutions if such transfers serve to advance the original intention of the grant. Qualified institutions include 501(c)(3) institutions, government instrumentalities, and foreign equivalents.

For grants that have received all scheduled payments from JSMF or for grants with small amounts of funds remaining, JSMF recommends institutions consider negotiating a subcontract award in support of the grant’s purpose at the new institution.

For grants with scheduled payments remaining to be paid and/or if it is not desirable for institutions to negotiate a subcontract the following procedures are in place for requesting approval of a grant transfer.

1. The grant’s Principal Investigator or Project Manager should contact JSMF grant-admin@jsmf.org with the following information:
   a. the reason for transfer request
   b. an anticipated transfer timeline
   c. the name of the new institution

2. Once the timeline has been finalized, the original grantee institution should submit a grant transfer request to grant-admin@jsmf.org with the following information:
   a. total amount paid by JSMF to date
   b. total accounting expenditures including any encumbrances
   c. balance to be transferred

3. JSMF will review the request and respond with a decision to either approve transfer or decline transfer request.

If the request is approved by JSMF, then the new institution completes the transfer request by providing a budget for the transfer amount agreed to by both institutions.
4. Upon agreement by both institutions, JSMF will prepare a transfer memorandum to be reviewed and signed by both grantee institutions as well as JSMF. The memo will outline all transfer details including transfer date, amount, and basic terms and conditions. **Grantee institutions must provide JSMF with full contact information for signature authorities.**

The transfer memorandum will be completely electronically by all three parties via Adobe Sign. Signing the memorandum constitutes agreement by the new institution to assume responsibility for completion of the project effort and to administer the grant (as originally awarded) from the transfer date to completion in accordance with the terms and conditions that normally govern JSMF grants made to the new institution.

5. Completion of the transfer memorandum & award notification by the JSMF Grants Manager will constitute JSMF approval of the grant transfer. The award notification also will specify the applicable basic terms and conditions that govern the grant.

Contact information for the grant accountant or sponsored projects reporting email address must be provided to JSMF by the new institution. For grants with additional payments due, the new institution will also need to provide JSMF with a signed payment authorization form.

**Important:** Upon transfer of the grant to the new institution, any monetary discrepancies must be resolved between the original and the new grantee. JSMF will not intervene in any disputes between the two institutions regarding the transferred amount.

The new institution will need to provide JSMF [grant-admin@jsmf.org](mailto:grant-admin@jsmf.org) with the opening balance or transferred amount received.

Equipment purchased with JSMF funds for use in a specific project should remain available for use for the duration of the project. Principal Investigators or Project Managers with projects that included funding for equipment and who will continue the project at a new institution with JSMF support should be able to arrange with their original institution to have the equipment transferred with them. Reasonable shipping costs for such equipment may be charged to the original or transferred grant as an allowable cost. Budgets should not include funds to buy equipment that had been previously obtained with JSMF funds.