



Dear Award Recipient:

As an ACR Research & Education Foundation award recipient, your funding requires compliance with the policies as outlined in the original Conditions of Award. The REF understands, however, that career decisions can change for many reasons and that award recipients may move to a different laboratory or institution. The decision to fund your award was based on a careful review of your personal experience and abilities, your mentor (if appropriate), the institution where you work, and the project you proposed. We must therefore be certain that the training or career development that you will receive in your new institution/lab is at least equal to that originally proposed, and that your project has the same degree of scientific rigor or educational impact. All requests for transfers will be considered on a case-by-case basis. Furthermore, your Conditions of Award shall be temporarily suspended pending approval of your institutional transfer request.

Formal transfer requests should be made using the attached Award Transfer Request Checklist and submitted to the REF along with the required supporting documentation. Requests will be reviewed by the Scientific Advisory Council, the governing body of the REF's Awards and Grants Program, and granted or denied at their discretion.

In order to process your request, we ask that you provide the following documents:

- 1) A letter explaining the reason(s) for the transfer and its effect on your proposed project as well as your career development. In the letter, you should describe in detail your new position, the research or educational environment in which you will work, and how the REF award will be used in that position. Include the percent of your time that will be dedicated to research, teaching, clinical duties, etc. You should also provide a description of the project that will be undertaken at the accepting institution and the benchmarks for success if either of these is different from the original proposal.
- 2) A letter of support from the pending Department Chair at the accepting institution guaranteeing the protected time to carry out the new project at this institution.
- 3) A letter from the new Mentor(s) agreeing to serve in that capacity, describing the resources that will be available and any other training that will be given to you (for example, course work in clinical research, a co-mentor in Geriatrics, etc.) Include a copy of Mentor's Biosketch(s).
- 4) A new application cover page or a document containing updated grants and contracts office information for the accepting institution including Payee, Contracts Official, mailing address for checks, and the institution's Tax ID number.
- 5) A revised budget, if applicable.
- 6) Updated certification of IRB/IACUC approval, if applicable
- 7) Approval from the Grants & Contracts Official at the accepting institution confirming transfer of funds requirements (i.e., no indirect costs, monies to be applied as noted in original proposal, etc.).

Sincerely,

Anne Davidson, MBBS
Chair, REF Scientific Advisory Council



AWARD TRANSFER REQUEST CHECKLIST

TRANSFER POLICY

Awards may not be transferred between individuals. Transfers between institutions will be considered on a case-by-case basis. Requests should be made using the Award Transfer Request Checklist and submitted to the REF along with the required supporting documentation. Requests are reviewed and granted at the discretion of the Scientific Advisory Council, the governing body of the REF's Awards and Grants Program. **If your request is granted, the REF will send a revised Conditions of Award, which must be signed by the applicant as well as the authorizing official at the accepting institution and returned to REF in order to complete the transfer.**

Applicant Name:	
Award:	Terms:
Requesting transfer from:	
Requesting transfer to:	

N/A Yes Check off required items below AND SEND TO REF WITH CHECKLIST AS COVER PAGE:

(Please see cover letter for specifics on what is to be submitted.)

- Letter from Applicant
- Department Chair letter of support
- Mentor(s) letter of support (Include a copy of Biosketch)
- New application cover page (or other document with updated Grants and Contracts information)
- Revised budget *Fringe rate at accepting institution (not to exceed 30%) will be permitted. Please provide institutional fringe rate documentation.
- Updated certification of IRB/IACUC approval, if applicable
- Other _____

Comments:

By signing below, the institution and original award recipient certify that the award transfer, if approved, will be granted to the sponsoring institution for use by the applicant. The sponsoring institution agrees to guarantee a percentage of the candidate's time to achieve the goal of the proposed project as outlined in the original application and according to award terms and conditions. *Salary support guidelines include: salary and fringe benefits (fringe rate not to exceed 30%) and ONLY as outlined in the approved budget. Funds cannot be used to provide institutional support. No indirect costs or overhead will be provided. All contractual documents must be received, and compliant documents must be signed, before financial disbursements will be made. Disbursements are made bi-annually in January and July. All unexpended funds must be returned to the REF at the close of the award. No-cost extension requests for funds not used during the award period should be submitted prior to the award end-date and may be granted at the discretion of the REF.* I understand and acknowledge consent to the terms and conditions as described above.

Signature: _____
Award Recipient

Date: _____

Signature: _____
*Sponsored Programs / Grants and Contracts Officer
at Accepting Institution*

Date: _____

