



Summary of the Transfer Process for a NSF Award

The NSF Transfer Policy requires that NSF approve transfers from one institution to another before the expiration of the project period. The decision to authorize transfer of the grant will be based upon the following information:

The project has been relinquished by the current institution before the expiration

The facilities and resources at the new location allow for the successful performance of the project

The PI plans no significant change in research objectives and level of expenditures from those described in the previously approved project.

To request the transfer, you should notify the NSF Program Office to request preliminary approval for the transfer.

If NSF and both institutions agree, formal notification of the impending transfer should be electronically initiated by you or the current institution's Sponsored Projects Office through FastLane. The request shall include a:

- Brief summary of progress to date
- Description of work yet to be accomplished (NOTE: This should be a statement of work for the time remaining in the project period that references the new institution)
- Completed on-line transfer request, including total disbursements and unpaid obligations to date (transfer amount will be automatically calculated, based on the amount entered in total disbursements).
- Detailed line item budget for the transfer amount and any outstanding continuing grant increments. The most current Federal Cash Transaction Report must be posted to NSF's financial accounting system prior to submitting the transfer request – your Sponsored Projects Office can assist with this information.
- If funding is requested to support a postdoctoral researcher, then the request must include the requisite mentoring plan as described in [GPG Chapter II.C.2.j](#). The plan must be uploaded to the "Other Supplementary Documents" section of Fastlane. You must report on the mentoring activities provided to the individual(s) in annual and final project reports.
- The relinquishing grantee institution will need to electronically route the transfer request to the new institution to complete the process.

Once that is completed the new institution, with your assistance, will need to complete the request by:

- Providing a detailed budget and budget justification for the transfer amount agreed to by both organizations. Upon transfer of the grant to the new organization, any monetary discrepancies must be resolved between the original and the new grantee. NSF will not intervene in any disputes between the two organizations regarding the transferred amount; and
- Electronically signing the request when submitted to NSF.

Upon receipt of the above material, NSF will review the request and, if approved, deduct the specified transfer amount from the original grant and re-establish it under a new grant number at the new organization. Award notification by the NSF Grants and Agreements Officer will constitute NSF approval of the grant transfer.

As a final step, the PI should log-in and update his/her FastLane profile to reflect the change of institution.