Transferring Projects to North Carolina State University

Purpose:
Provide a sequence of events that need to occur when transferring a project to NC State University from a qualifying organization.

Scope:
This Standard Operating Procedure (SOP) outlines NC State’s process when a project is being transferred to NC State. Grants are awarded to institutions, not individuals, therefore the grantee institution must relinquish the grant and equipment (if applicable) and the sponsor must approve the transferring of the project. The following table provides a sequence of events that must occur in order for a project to be transferred to NC State from another qualifying organization.

SOP Steward(s):
SPARCS Associate Director, Operations & Operations Manager
Contact via sps@ncsu.edu

Glossary and contacts related to some terms:
CRO/GBO = College Research Office or Grants Business Officer
SPARCS = Sponsored Programs and Regulatory Compliance
C&G = Contracts & Grants
PI = Principal Investigator
PINS = Project Information Navigation System
RADAR = Research Administration Data + Reports

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<th>Seq</th>
<th>What to Do</th>
<th>Who Does It</th>
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| 1   | PLAN the move. CRO, in concert with Dept. Head, will contact incoming PI to determine what project(s) PI wishes to transfer to NCSU. Assemble contact information from PI of Grantee institution and sponsor contact names, phone numbers and email addresses. Key information needed:  
- Name of incoming PI and departmental affiliation  
- Name of Grantee institution  
- Arrival date  
- Projected effective date(s) for transferred projects  
- Sponsoring agency name  
- Sponsoring agency AND Grantee institution award #  
- Budget Period  
- Grants/Program Officer contact info  
- Grantee institution contact info  
- Full proposal and award documents  
- Budget and budget justification  
- Work yet to be accomplished  
- Incoming Graduate students who will be paid from transferred project  
- Notification from transferring organization of their intent to transfer project (relinquishment letter/email) | PI, Dept Head, CRO |
| 2   | PREPARE/SUBMIT new project proposal in PINS. If needed, depending on date incoming PI will arrive, add incoming PI into system as either a No-Pay or an Adjunct faculty member so that | CRO |
| 3 | PRE-AWARD ACCOUNTS can be requested with approval from CRO. These are initiated in RADAR. | Dept. Head, Departmental Contracts Manager, PI, C&G, CRO and SPARCS |