LMU Lincoln Memorial University Checklist for Transferring Research In

Revised: 12/19/2024

Be sure you have signed your LMU offer letter and have a university appointment - coordinate with your new LMU department/institute administrator.

Start at your CURRENT institution

Notify your current institution's **sponsored programs office** about awards that will be transferred to Lincoln Memorial University

The following must be completed to transfer awards:

- Reconciliation of accounts and expenditures (including subs)
- Completion of financial reports
- Closeout of awards*

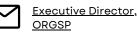
* Each institution and sponsor has varied steps and requirements to closeout an award.

Notify your **sponsors(s)** about your move to Lincoln Memorial University and **determine if the award(s) is/are eligible for transfer.**

Have your current institution contact the Executive Director of ORGSP for each award to be transferred per sponsor requirements for transfer requests.

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PI on LMU award cannot also be PI on sub to previous institution.



Get PROPOSALS started at Lincoln Memorial University

Complete an Internal Routing Form for Grant/Contract

Submission (IRF) for each award transferring to Lincoln

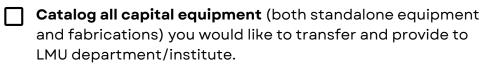
Memorial University and all new proposals.



Internal Routing Form for Grant/Contract Submission Re-budget to account for differences between Lincoln Memorial University's indirect cost percentage and departing institution rate.

Submit IRF form and budget for each award to the Executive Director of ORGSP.

Transferring Lab Equipment/Property



Coordinate with your current institution and LMU's Finance Office to determine if equipment is eligible for transfer.

Property transfers generally fall into three situations:

Non-government titled equipment is coordinated directly between you, your current institution and your LMU department/institute.

Government titled property is coordinated with your current institution, LMU Finance and the sponsor.

Property purchased on an inactive award is coordinated with your current institution, LMU Finance and the sponsor.

Coordinate with your current institution and your LMU department/institute to negotiate price for equipment transfer, moving costs, insurance and other details

Arrange for designated personnel at each end of the transfer process to pack-up and handover to transport at current institution and designated personnel to receive equipment/property at LMU.



LMU's indirect cost rate is 32.2% on campus and 11.2% off campus through 06/30/27.



If submitting proposal(s) before official LMU start date, work with your LMU department contact to set up temporary

appointment.



Sample Equipment Inventory



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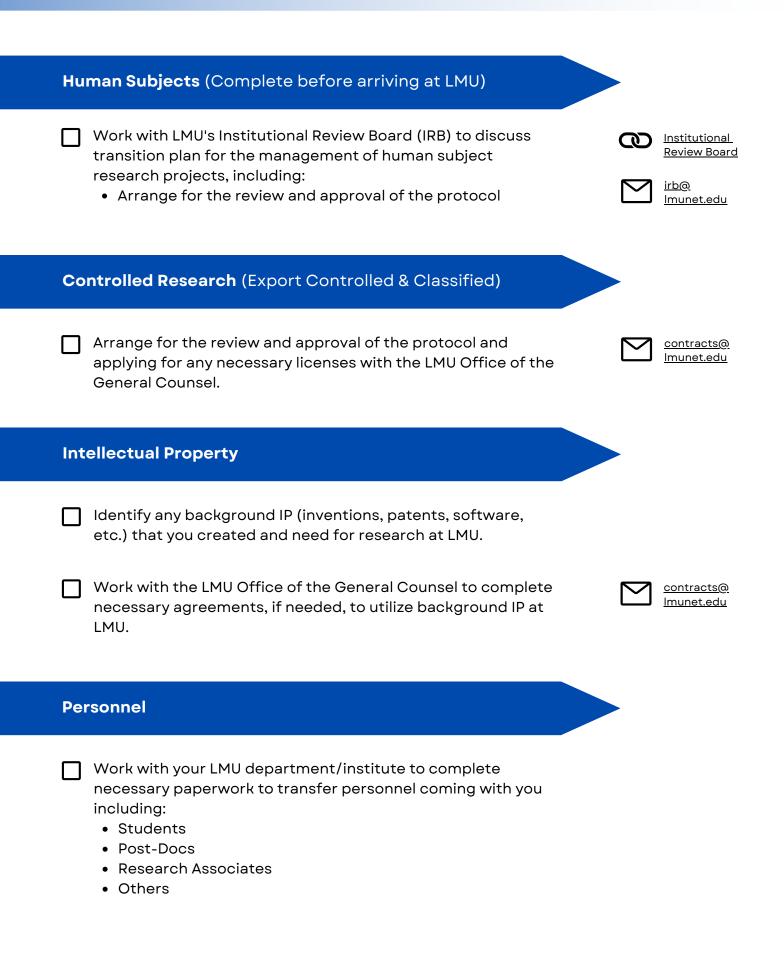
| Sponsor |
|--------------|
| approval may |
| be required. |

Transferring Research Materials/Supplies

| | Catalog all non-capital equipment, research materials and/or supplies you would like to transfer and provide list to your LMU department/institute. | | <u>Sample Equipment</u> Inventor <u>y</u> |
|------|--|-----------|---|
| | Coordinate with your current institution and your LMU department/institute to negotiate price for materials/supplies transfer, moving costs, insurance and other details. | | |
| | Complete any required Materials Transfer Agreements with the LMU Office of General Counsel. | \square | <u>contracts@</u> Imunet.edu |
| | Coordinate transfer with your current institution and your LMU department/institute. | | |
| | Arrange for designated personnel at each end of the transfer process to pack-up and handover to transport at current institution and designated personnel to receive equipment/property at LMU. | | |
| Set | Sing Up Your Lab (Complete before arriving at LMU) | | |
| | Notify your LMU department/institute of all facility needs, ie Specialized equipment needs and/or HVAC requirements Nature/type/quantity of research materials used | 0 | <u>Institutional</u> <u>Biological and</u> <u>Chemical Safety</u> <u>Committee</u> |
| | Arrange for the review and approval of the protocol | | |
| Anir | mal Subjects (Complete before arriving at LMU) | ത | Institutional Animal Care and Use |
| | Arrange for the review and approval of the protocol Speak with your LMU department/institute about the possibility of an Inter-Institutional Collaborative Agreement for Research with Vertebrate Animals (ORGSP can provide guidance) | ľ | Committee NOTE: LMU does not currently house lab animal facilities |



| <u>Institutional</u> |
|-----------------------|
| Biological and |
| Chemical Safety |
| Committee |



Other Contractual Obligations & Gifts

| Terminate or transfer responsibilities for other contractual obligations to LMU, for example: Material Cost Agreement No Cost Collaborations Bailment Agreements Data Use Agreements Non-Disclosure Agreements |
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| Notify sponsor(s) of these changes. |
| Coordinate with the LMU Office of General Counsel. |
| Identify any research gifts that you are eligible to transfer to LMU and coordinate with the LMU Advancement Department. |

