

# Research Fund Carry-over Request Form

## Due October 15, 2017

MEOPAR operates on the principle that investigators should strive to complete their research activities according to the timelines projected in their proposals. However, we understand that some elements of the research are beyond your control and can create delays.

As a result, MEOPAR has created a *Research Fund Carry-over Policy* and process for investigators to request permission to carry forward research funds.

### Research Fund Carry-over Request (within your project years)

*Requirement: Complete Section A of attached form*

Investigators are permitted to automatically carry over up to 25% of their **annual individual award** within project years. Request to carry over **more than 25%** must be submitted by October 15, 2017. This will be approved by the Board on recommendation of the RMC at the December Board meeting, on a case-by-case basis. Subsequent award transfer amounts will be adjusted based on the carry-over status of each investigator research account. Approved amounts will be distributed in April.

### Research Fund Carry-over Request (beyond your project end date)

*Requirement: Complete Section B of attached form*

Investigators are permitted to automatically carry over up to 10% of their **total individual award** beyond project year end date but within the MEOPAR funding Cycle (i.e. 2017-2022). Request to carry over **more than 10%** must be submitted by October 15, 2017. This will be approved by the Board on recommendation of the RMC on a case-by-case basis. Carry-over funds must be used within 1 year from end of project date.

Definitions:

- Investigators: Anyone who received research, partnership and/or workshop awards from MEOPAR. There are typically multiple investigators on a given project; each investigator must submit their own Research Fund Carry-over Request Form.

- Annual Individual Award: Refers to the specific amount awarded to a given investigator for the current fiscal year (both April and October installments).
- Total Individual Award: Refers to the specific amount awarded to a given investigator within a project, for the duration of that project. Investigators should use the total amount of funds they were awarded for the entirety of the project.

Questions can be directed to Darlene Auld at [Darlene.Auld@meopar.ca](mailto:Darlene.Auld@meopar.ca) or (902) 494 – 4388.

MEOPAR (Fall, 2017)

# Residual Balance Form

Submit your completed form to Darlene.Auld@meopar.ca by Oct.15, 2017.

Project Name (as stated in the proposal submitted):

Investigator Name:

University:

**I DO NOT** request any carry-over of funds OR a carry-over beyond the automatic carry-over percentage.

If you are carrying over funds within project years, complete Section A. If you are carrying over funds beyond project end date, complete Section B.

## **Section A (carrying funds over before your project end date):**

Annual Individual Award\* (\$):

(\*total amount awarded to you during April 2017-March 2018)

Account Balance (As of 30 Sep 2017):

Requested Carry Forward Amount (\$):

Percent of Annual Individual Award Requested for Carry Forward (%):

(If this number exceeds 25%, you must complete Rationale Explanation - below)

## **Section B (carrying funds beyond the project end date):**

Total Individual Award\* (\$):

(\*total amount awarded to you for the duration of the project)

Account Balance (As of 30 Sep 2017):

Requested Carry Forward Amount (\$):

Percent of Total Individual Award Requested for Carry Forward (%):

(If this number exceeds 10%, you must complete Rationale Explanation below)

**Rationale for Carry-over Request (briefly explain why you are requesting a Carry-over of funds):**