

ADDENDUM # 1: REQUEST FOR TRANSFER EMAIL

Reference Grant ID #XXXXX in email subject line

Dear Program Officer,

We are requesting that Robert Wood Johnson Foundation (RWJF) transfer the above referenced grant to [name of anticipated new grantee organization]. By means of this email, [grantee name] agrees to terminate this award on [month, day, year]. Our intention is that the transferred grant period be [month, date, year] to [month, date, year].

Sincerely,

Project Director/Authorized Official

cc: Program Financial Analyst
National Program Office (if applicable)

ADDENDUM #2: RELINQUISHMENT LETTER

Date

RWJF Program Financial Analyst
Robert Wood Johnson Foundation
50 College Road East
Princeton, NJ 08543

Reference Grant ID #XXXXX

Dear Program Financial Analyst,

On [month, date, year], [Project Director/Authorized Office] notified the Robert Wood Johnson Foundation (RWJF) via email of the request to transfer the above referenced grant to [new grantee institution]. This letter will serve as [grantee name]'s official relinquishment of this grant as of [month, date, year]. The anticipated start date at [transfer grantee institution] will be Month, Day, Year.

[Grantee name] agrees to relinquish all unspent and uncommitted funds and return any unspent

and uncommitted funds in its possession to RWJF. The amount of unspent and uncommitted funds available to be returned to RWJF for transfer is \$_____. Within 30 days of terminating this award, [grantee name] will submit a final financial report that will provide an exact unexpended amount. [Grantee Name] will make every effort to return unspent funds in its possession within 30 days of submitting the final financial report.

Sincerely,

Financial Official

cc: Program Officer
Project Director
National Program Office (if applicable)

ADDENDUM #3: Transfer Grant Budgeting Procedures

Please use the following examples as a guide when preparing for a transfer grant.

- Grant #12345 was awarded in the amount of \$1,000,000 for the period January 1, 2019, through December 31, 2021, and is scheduled to be transferred effective September 1, 2020. If, for example, expenses were projected to be \$250,000 for the period January 1, 2019, through August 31, 2020, the maximum amount that could be budgeted for the transfer grant would be as follows:

Current Grant #12345	\$1,000,000
Less: Projected Expense 1/1/19-8/31/20 Unexpended Funds	<u>(\$250,000)</u>
Maximum amount available for transfer	\$750,000

- If payments to date have been \$450,000 and the projected expenses are \$250,000, then a refund is due to the Robert Wood Johnson Foundation in the amount of \$200,000.

Payments to Date	\$450,000
Less: Projected Expenditures	<u>(\$250,000)</u>
Refund Due	\$200,000

When projecting expenses for the period January 1, 2019, through August 31, 2020, under grant #12345 please be cognizant of the following:

- If actual expenses incurred for this period are less than your projected expenses, the difference between your projected and actual expenses incurred will be canceled. For example:

Projected Expenses 1/1/19-8/31/20	\$250,000
Less: Actual Expenses Incurred 1/1/19-8/31/20	<u>(\$240,000)</u>
Amount that Will Be Canceled	\$10,000

- If actual expenses incurred for this period are greater than your projected expenses, the amount in excess of your original projection will need to be absorbed by other support. For example:

Projected Expenses 1/1/19-8/31/20	\$250,000
Less: Actual Expenses Incurred 1/1/19-8/31/20	<u>(\$253,000)</u>
Amount to be Absorbed by Other Support	\$3,000

Consequently, you should make sure that your projections are as accurate as possible.