

Deferred funding policy

Effective April 2020, WCHRI has amended funding policies that affect award payments, installments and/or annual commitments. Awarded funding will be based on evidence of need; funding will be provided in installments that correspond with cash flow requirements (or evidenced spent rate) of the research project, compliance with award guidelines and/or terms and conditions.

Request for deferred start

WCHRI may support a deferred start date of up to one year from the offer of award start date, where the awardee has made a formal written request no less than 2 weeks prior to all account and/or implementation deadlines (whichever happens first). A deferred start date exhausts no-cost extension eligibility in the same manner as an end date no-cost extension; WCHRI will consider a one-time (1), (up to) one-year (1) start date deferral. Where an award that has benefited from a deferred start is non-compliant to commence at the deferred start date, the WCHRI offer of award and all financial commitments will be void.

Awardees should note that deferral of installments/annual commitments does not negatively affect further application to WCHRI funding opportunities. Awardee use of deferral and associated deferral policies demonstrates responsible fiscal management of grant funds, and helps to support the availability of financial resources which are invested in research programs.

Accrued funding and deferred annual payment

Where funding has accrued in a research account due to delayed research activity (including staffing, patient recruitment, research resources) awardees are to contact WCHRI Grants to request payment deferral. Deferring an installment/annual commitment extends the life of the grant and offers awardees the opportunity to re-define research activities that will be achieved within the (progress) reporting cycle. The total maximum period of extension for any implemented award will not exceed one year from the original end date.

Progress report and funding release

In addition to research achievements and current requirements, annual progress reporting must clearly detail research activities that are to occur within the next funding period and the corresponding budget requirements for these activities. No funding will be released until reporting has been reviewed, satisfies grant requirements and evidences the need for further funding payment where further funding commitments exist. All financial disbursements are based on the availability of financial resources.

Deferred payment criteria

Upon assessment of reporting, WCHRI may defer a funding payment, installment and/or annual commitment at its sole discretion, however the following will be considerations:

- 1) the spend rate must support immediate financial need;
- 2) limitations and/or barriers to completing the work have been identified/ disclosed and/or; (satisfactorily) addressed;
- 3) evidence that work will be completed in keeping with the expected award period of support;
- 4) compliance with program guidelines and/or terms and conditions.

WCHRI will review and amend this policy as required to support budget and financial pressure and in keeping with funding program and grant opportunity requirements. Terms and conditions may be different between programs. Refer to program supports for specific program requirements and restrictions.

1. For further information

For questions regarding [WCHRI research grants](#), contact Michelle Bailleux, at wcgrants@ualberta.ca.