**Bridge and Temporary Funding Guidelines for**

**Research Continuity and Key Personnel Retention**

*Updated May 2025-Rev 1:05-13-2025*

Eligibility for Assistance -

Guidelines are for Faculty where Grant/Contract Funding Flows through PSOM.

A. Bridging of Grant Renewals that Missed Payline (traditional PSOM Bridge)

* Competitive renewal or equivalent continuation or replacement grant that has been reviewed positively but did not reach a fundable score (must be critically evaluated for future fundability).

B. Support for Delay in Funding due to Federal slowdown

* Competitive renewal or equivalent continuation or replacement grant with a funding gap because NIH study section has been delayed, or with a likely fundable score where council review has been delayed, or where expected notice of award date has been delayed.
* New junior investigator whose fundable Federal grant application is delayed by a federal sponsor as above (\*exception to requirement to be continuation of extramural support).

C. Support to Facilitate Pivots, or Soft Landings/Wind-down costs:

* Stop work order or termination of grant/contract received, including from subcontractor. Temporary funding should be to support essential personnel and activities linked with focused plan for new submission within fundable domains, or plan for project wind-down and transitioning trainees and staff.

Funding Prioritization Guidelines

* Support for trainees within a faculty’s lab/research group whose funding is lost due to program cancellation or stop-work orders.
* Bridging of ongoing research programs through retention of critical staff.
* Lower priority will be given to requests from faculty with multiple active grants, even if the bridging request pertains to a different project.
* Departments should consider the appropriateness of bridge funding based on likelihood of project regaining funding.
* Bridging is meant to support a minimal level of basal activity to retain key personnel and minimize loss of momentum, but it is not meant to fully replace an extramural grant.
* Bridge funding may be contingent upon cost-reduction efforts (e.g., reduced lab/research group size). Departments and PIs are encouraged to explore shared staffing and other resources to lower costs.
* Faculty salary, travel, equipment, renovation costs are not allowable Bridge costs.
* Bridging is based on continuation of an extramurally funded project; intramurally funded, pilot projects or new research areas cannot be bridged (\*exception: delay in fundable grant to new junior investigator).

Administrative Guidelines

* Business Administrators should anticipate/forecast which PIs are likely to request support to allow for resource planning and help the Chair set funding priorities.
* Before requesting support from PSOM’s Bridge Funding Partnership Program (BFPP), all other funds available to the PI should be utilized first, including start-up funds, allowable endowments or gifts, allowable grants/contracts, pilot funds, reserves, tech. transfer funds, discretionary funds, etc.
* Before requesting BFPP support, departments should examine all Department funding sources, including academic development funds, allowable endowments or gifts, reserves, tech. transfer funds, etc. If Departmental funds are available but are not being allocated to the bridge request, an explanation should be provided.
* Affiliated Centers or Institutes should be queried about the possibility of support.
* **Only after a plan is developed that includes use of local resources should faculty members apply to the PSOM BFPP for support.**
* Requests will be reviewed by PSOM Finance to ensure compliance with these guidelines.
* We would expect funding would cover necessary costs for up to a 6-month period per PI for Delays or Soft Landing/Wind-down, or 12 months for Bridge or Pivot requests.
* Bridge funding will cease upon funding of EITHER the pending renewal application, or ANY new equivalent-sized grant to the faculty/research program.

**Guidelines for Bridge Funding Partnership Program**

Overview:

The purpose of the Bridge Funding Partnership Program (BFPP) is to provide funding for an extramurally funded research project to enable the continuation of a basal level of research program/lab activity and avoid loss of essential personnel, resources, or momentum, such that a currently funded project may progress to funding renewal.

The program is intended for extramurally funded research projects only, and requests for bridging from pilot studies, intramurally supported or unfunded research cannot be considered (\*except delayed grant award to new investigator). Only projects administered through the School of Medicine are eligible. Projects must have a high likelihood of continued funding by the sponsor to be supported by this program. For example, this program will not support projects that have received poor scores that make subsequent funding unlikely. Similarly, the program will not fund projects that have completed a final review without being funded, except in extraordinary circumstances. In this case, the unfunded application should have received excellent scores and reviews, making it highly promising for renewal in a revised format, and a clear plan should be offered as to how the project will be continued in the form of a restructured new application. For Pivot/Soft Landing requests, a clear plan should be provided for refocused application in fundable domain, or project wind-down.

Request parameters:

If possible, requests should be made prior to the end of existing funding. In addition, projects must have been submitted for renewal to the original funding agency in advance of the termination deadline and the review must be in hand. Proposals submitted for competitive renewal, whose review by study section and/or council is postponed due to NIH administrative issues, may also be considered for bridging. **Funding requests must align with the 'Bridge and Temporary-Funding Guidelines' outlined above.**

The faculty member should have already explored all other possible funding sources with their department chair. Any discretionary funds (start-up funds, special purpose funds, technology transfer funds, unrestricted gifts/endowments, etc.) available to the PI should be expended prior to use of bridge funds, unless restricted. Requests will be considered for individual projects if no overlap exists with other funded projects. If other funded projects exist, this factor will be considered by the committee and more stringent rules will be applied. Note that the BFPP is not meant to replace a full R01 or R35 equivalent but to support essential basal needs to prevent loss of critical resources or momentum.

If application is for a program project or equivalent (P01, P50, SCOR, etc.), a separate request should be made for each project within the program. If application to bridge an MPI project, the request should be clear about what funds of the existing project were allocated to the requesting faculty’s lab or program.

The requestor’s Home Department Chair and/or Division Chief must determine whether the request has merit and endorse the request in writing to be considered for funding. For requests involving projects within Program projects or equivalent, the request should include written support of the Program PI.

Eligibility: All full-time School of Medicine faculty (tenure, C-E and research tracks). Part time and emeritus faculty are not eligible.

Deadlines: Requests for Bridge Funding will be accepted three times per year. This year, our deadlines are May 15, August 31 and January 15 (if these dates fall on a weekend or holiday, the following business day is acceptable). Submit all requests to **Mary Kennedy-Bart** in the Finance office (maryken@pennmedicine.upenn.edu). Question about eligibility and/or the application process should be directed to Ms. Kennedy-Bart via email.

Budget guidelines for Bridge Funding (see the Budget template for further details):

* If this request is not for bridging of an existing grant for which a standard competing renewal application is pending, a clear and specific explanation should be provided.
* The request for bridge funding or Pivot should not exceed 12 months; funding for Delays, or Soft Landing/Wind-down should not exceed 6 months.
* The request amount should reflect the minimum needed to maintain basal research activity and not lose key personnel/resources/momentum and may not exceed the final year budget of the ending/ended grant for which Bridge funding is requested (pro-rated to 6 months for delays or wind-down), less non-allowable items (see below).
* \* New investigator delayed funding should reflect a reasonable budget reviewed with the department chair and business administrator based on actual expenses.
* Funding may include essential project support personnel, services and supplies only.
* Personnel expenses for Faculty are non-allowable. Equipment, travel, and faculty salary should not be requested.
* A letter of support from the Department Chair and/or Division Chief should be included that indicates support for the request and addresses other resources available.
* Bridge recipient must provide notification of pending status when received, whether positive or negative. Bridge funding will cease upon funding of either the pending renewal application or any new equivalent-sized grant to the lab.
* Bridge recipient must provide summary of expenditures at end of bridge award term.

See the attached checklist for a list of items that must be submitted, and the **Summary of Other Support** for additional reporting requirements. **Be sure that the information is accurate and up to date, and explanations are clear and concise.** Incomplete requests cannot be considered. When submitting your application, documents should be in order as presented on checklist. Please reference document page # on checklist and include as Cover Page of your application. Application should be submitted via e-mail as a PDF. Budget request/funding history should be an Excel file.

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| **Faculty requesting support** | **Business Administrator** |
| Name: | Name: |
| Email: | Email: |
| Phone: | Phone: |
| Home Dept: |  |

**CHECKLIST**

***Submit application in order of checklist items as a single PDF. Do not include material not requested. All items should be reviewed by the faculty member requesting bridging. Requests that are incomplete or inaccurate cannot be considered.***

* Bridge Request Template (see attached)
* Other support information (see attached): Use template attached and be sure information is accurate, updated, and clear. Be clear what are the grants (current/ended and pending) related to bridge request. This must be reviewed and approved by the requesting faculty member, this is not administrative boilerplate.
* Grant budget pages including budget justification:

(a) Final year of the ending/ended project for which bridging is requested

(b) Most recent request for funding continuation at the primary agency.

* Pending grant: Abstract; Specific Aims, and Introduction to Revision/Rebuttal (if applicable). Do not include the whole grant application
* Reviews/critiques of the most recent review of the grant being bridged to (summary statement). Do not include other reviews.
* Faculty biosketch (NIH format).
* Letter of support from the requestor’s home Department Chair and/or Division Chief endorsing the request and addressing other resources available to the PI.
* In the case of sub-project in program projects or center grants, a letter of support from the Program/Center PI.
* **See website for separate file that includes both Budget Request and Funding History:**
  + Budget request template (available on website) and brief budget justification (1/2 page maximum). For personnel, indicate role in the ending project and how long they have been in the lab.
  + Funding history template (available on website). All information must be provided for all submissions (including planned) of pending grant. If project for which bridging is requested is not a standard competing renewal, provide a clear explanation in the Bridge Request Template.

PI NAME \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

HOME DEPARTMENT \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

REQUEST TYPE: [ ] Traditional Bridge [ ] Delay [ ] Pivot [ ] Project Wind-down

**Bridge Request Template:**

1. Concise explanation of the project’s prior funding history, and the competing renewal submission(s) and status (half page maximum). Be clear: what expiring grant is being bridged, and what is the anticipated new grant being bridged to, what has been its submission history and outcome(s) and next steps. Note any extenuating circumstances. Also, note what other funds are available for the lab, and what other applications are pending/planned.

2. Concise summary of project accomplishments in current funding cycle (half page maximum).

3. Concise overview of plan for resubmission and response to critiques (half page maximum; not applicable for Delays).

4. Explain what are the in-place resources at risk of loss should there be a gap in funding (half page maximum).

5. Has the PI previously received PSOM Bridge Funds and, if so, provide details including outcome of independent funding and relationship to current request.

*Questions below for Pivot/Winddown only*

6. Concise plan for new submission within fundable domains. Include anticipated timeline for seeking extramural funding

7. Describe staffing needed to support this new research. On *Budget Worksheet Template,* indicate whether these individuals are currently members of the lab and whether there are planned discontinuations or other reductions/transitions in staff. Does the lab currently have access to the appropriate staff resources to support this new effort? Explain.

* 1. Will the pivot involve new collaborators? If so, please provide details
     1. If winddown: On *Budget Worksheet Template,* explain costs related to winddown of operations.

PI NAME \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

HOME DEPARTMENT \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**OTHER SUPPORT**

* *Be clear which is the grant (current/past) for which bridging is requested, and the pending grant that will be bridged to.*
* *Indicate all support available to the requesting faculty including Grants, Institutional Funds, Tech Transfer or other discretionary funds.*
* *This page must be reviewed by requesting faculty member to be sure it is complete, accurate, and up to date.*

A. Current Support

B. Pending Support

C. Recently Completed Support *(ended within the past year - either original grant dates or NCE)*

Format for Other Support (Grants):

Source / Number:

Grant Title:

PI (if not PI, specify role on project):

Dates of Project (if applicable, also indicate NCE dates):

Annual Direct Costs (if not PI, specify amount to applicant’s lab):

If in NCE, indicate NCE amount available:

Relationship to Bridge request:

Format for Other Support (other than grants):

Type of account:

Title (if applicable):

Restrictions (if any):

Balance: