

Transferring Research Equipment to Other Institutions

POLICY

When a principal investigator takes permanent employment at an educational, nonprofit, or private institution, equipment may be transferred to the new institution in accordance with the following procedures.

Applicability

This policy applies to inventoried and noninventoried (capitalized and noncapitalized) equipment purchased with state and/or sponsored accounts.

Timing

Approval must be granted before equipment items may be transferred off campus. Begin transfer procedures at least three months before the planned transfer date.

SPONSOR-ACQUIRED

An equipment item acquired under a sponsored agreement may be transferred to another institution if both of the following apply:

- The sponsor's agreement and regulations do not prohibit equipment transfer.
- The item is not needed by the University.

Contact Sponsored Programs Services (SPS)

Before submitting a transfer request, a departmental representative should discuss the transfer with Sponsored Programs Services (SPS) personnel. Sponsored Programs Services provides an initial determination regarding the allowability of the transfer.

Request Memorandum

The department requests equipment transfer by submitting a transfer request memorandum through administrative channels to SPS. Sponsored Programs Services personnel ensure that the request complies with sponsor agreements and regulations, e.g.:

OMB Circular A-110, OMB Circular A-21:

whitehouse.gov/omb/information-for-agencies/circulars/

and the Federal Demonstration Partnership:

thefdp.org

The request is to include the following information:

- The original funding source (program, budget, project).
- A complete list of equipment items to be transferred with item acquisition costs.
- WSU inventory numbers for inventoried equipment.
- An explanation for the transfer.

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Approval

Before transfer may occur, all of the following officials and offices must approve the request memorandum:

- Responsible department chair
- Responsible dean or director
- Director of SPS

STATE-PURCHASED EQUIPMENT

An equipment item purchased with state funds as part of a research project may be transferred and sold in accordance with the following procedure.

Initially, the department and Surplus Stores determine whether or not the state-owned item is needed by any WSU department. If not, the item may be sold to the outside institution. The department is to receive fair market value for the item.

Negotiation

In consultation with Surplus Stores, the owning department negotiates the equipment value with the receiving institution.

Approval

The sale must be approved in advance by Surplus Stores.

Request Memorandum

Once the value is finalized, the selling department provides Surplus Stores with a memorandum from the responsible department chair or dean including the following information:

- WSU departmental contact name and phone number
- Full account coding for depositing the department portion of the proceeds (fund, subfund, program, budget, project, source, subsource)
- Contact information at the receiving institution
- Billing address and PO number from the receiving institution
- A complete list of equipment to be sold with item acquisition costs and selling prices
- WSU inventory numbers for inventoried equipment and whether the items are on departmental or University inventory
- An explanation of the transfer, including the principal investigator's name

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Invoicing

Surplus Stores sends an invoice to the receiving institution. Once payment is received, Surplus Stores notifies the department. Items may not be physically transferred to the receiving institution until the University receives payment.

Updating Inventory

Surplus Stores notifies Property Inventory of deleted items.

NOTE: Departments are responsible for updating departmental inventories to reflect deleted items (see *BPPM 20.50*).

Charges

Surplus Stores charges the transferring department a fee to process the transaction. The fee reflects the costs of billing, collection, and delivery (see *BPPM 20.76*).

SHIPPING

The University does not pay shipping costs to transfer equipment to other institutions. The receiving institution is responsible for arranging and paying for shipping.