Transferring Research Equipment to Other Institutions

NOTE: The website URL for Workday reference guides that are referenced in this section is: https://confluence.esg.wsu.edu/display/WKB/Workday

**POLICY**

When a principal investigator takes permanent employment at another educational, nonprofit, or private institution, equipment may be transferred to the new institution.

**Applicability**

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

**Timing**

Approval must be granted before equipment items change custody. 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 the following apply:

- Title vests with WSU and the sponsor's agreement and regulations do not prohibit equipment transfer; and
- Title vests with WSU and the item is not needed by the University; or
- Title vests with the sponsoring agency and the sponsor permits or directs the transfer of equipment.

**Contact Sponsored Programs Services (SPS)**

Before submitting a transfer request, a department representative should discuss the transfer with Sponsored Programs Services (SPS) personnel. SPS provides an initial review of the award and agency terms and conditions to determine whether the transfer is permissible.

**Transfer Request (Workday)**

The department requests equipment transfer by selecting "Transfer of Equipment" in a Dispose Asset business process in Workday. Workday routes Dispose Asset requests involving grant worktags to SPS. SPS personnel ensure that the request complies with sponsor agreements and regulations, e.g., Uniform Guidance 2 CFR 200 and the Federal Demonstration Partnership.

See the Workday Dispose Assets reference guide for instructions.
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**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 outside the University. The department is to receive fair market value for the item.

**Negotiation**

Surplus Stores determines equipment values, and the custodial department communicates the equipment values with the receiving institution.

**Approval**

The sale must be approved in advance by Surplus Stores. See *BPPM 20.76*.

**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 department contact name and phone number
- All applicable Foundation Data Model (FDM) revenue transaction worktags for depositing the department portion of the proceeds (e.g., cost center, fund, function, region)
- Contact information at the receiving entity
- Billing address and PO number from the receiving entity
- A complete list of equipment to be sold with item acquisition costs and selling prices
- WSU inventory numbers for the items that are listed in Workday or on departmental inventories as assets.
- An explanation of the transfer, including the PI's name

**Invoicing**

Surplus Stores sends an invoice to the receiving entity. Once payment is received, Surplus Stores notifies the department. Items may not be physically transferred to the receiving entity until the University receives payment.
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Updating Inventory
The custodial department starts a Dispose Asset--Transfer of Equipment business process in Workday. This initiates the process of removing the items from inventory. Surplus Stores reconciles the Workday notifications with the inventory listed in the department memorandum.

Consignment
Surplus Stores charges a consignment fee to process the sale transaction. The fee is added to the cost of the equipment and is paid by the receiving entity. For more information about the fees contact Surplus Stores; e-mail surplus@wsu.edu; telephone 509-335-3089.

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.