



Section 500: Award Management

OSR Policy 500.9 — Transfer or Sale of Capitalized Equipment

Responsible Officer: Director
Responsible Unit: Award Management
Effective date: July 1, 2008
Last revised on: March 20, 2008

Policy Statement

I. Equipment Loans

It may occasionally be necessary to loan equipment purchased with contract and grant funds to organizations or institutions participating jointly in a sponsored project. When state- and/or federally-owned equipment is loaned or transferred, it must be coordinated according to the procedures of Asset Management and Surplus Property ([ASM](#)) in conjunction with the Office of Sponsored Research ([OSR](#)) and the sponsoring agency.

II. Transfer of Equipment or Sponsor Property to Other Institutions

Subsequent to a researcher's decision to transfer to another institution, equipment purchases should be limited to those necessary to complete research at UNC–Chapel Hill. Additional equipment necessary to continue research at the receiving institution should be purchased by that institution.

Equipment owned by the federal government or other sponsors can be transferred to another institution when approved and directed by the sponsoring agency. Researchers transferring to another institution may submit a request for the transfer of such property in the pursuit of continuing research.

A transfer request originated by a faculty member requires the advance approval of the appropriate department head, dean, the Director of Sponsored Research, the Director of Asset Management and the sponsoring agency.

Agency-originated disposition or transfer instructions do not require such approval. However, if agency-directed or contemplated transfers are likely to impair continuing research or training projects at the University, such considerations should be promptly brought to the attention of the agency through OSR.



III. Transfer of Equipment to UNC–Chapel Hill

When new faculty members will be transferring equipment to UNC–Chapel Hill, the department should promptly advise Asset Management.

IV. Transfer of University Property

Property acquired or transferred to the University regarding research or training awards is considered to be owned by the State. Therefore, disposition or transfer of such property is subject to University and state policies.

V. Sale of Property

Proceeds from the sale of equipment purchased in whole or part from federal funds should be credited to the federal research project from which purchased or to an active award from that agency.

Reason for Policy

This policy assists University researchers supported by sponsored funding in determining the appropriate action with transfers, loans, or sales of capital equipment.

Exclusions/Exceptions

Although ASM is the unit responsible for final decisions on capital equipment management throughout the University, when questions arise regarding capital equipment purchased or paid for with sponsored funds, [OSR](#) serves as the primary contact.

Procedures and Related Policies

Equipment owned by the federal government or other sponsors can be transferred to another institution when approved and directed by the sponsoring agency. Researchers transferring to another institution may submit a request for the [transfer of equipment to other institutions](#) in the pursuit of continuing research.

OSR Research Tool Kits

None.

Contacts

Questions and concerns can be submitted online at [Ask OSR](#) or by using the [OSR staff directory](#). Within [RAMSeS](#), the “*Speak to Someone*” option assists in locating the staff member best suited to address project-specific issues.



References

 [Research Administration Glossary at Carolina](#)

1. Asset Management, a division of Material Disbursement Services (MDS).

Revision History

Prior Revisions: The policies in the *Office of Sponsored Research Policies & Procedures Manual* supersede any OSR policies, procedures and appendices previously included in the *University Business Manual*, a publication of UNC Chapel Hill's [Division of Finance](#).

