Closing Down an Office / Research Lab / Centre / Institute

This document provides guidelines for units to follow when their office/lab/centre is closing or decommissioning pertaining to moveable equipment assets* only. OEAR refers to the central “Online Equipment Asset Register” that tracks University moveable equipment assets. Senior administration in the unit are responsible for ensuring any assets purchased by research grants are being decommissioned or disposed of by approved methods stipulated in the research grant.

Frist step is to complete an inventory for the area. From this list assembled, the following can occur in order of partiality:

1. **Equipment Transfers (Internal)**
   - Equipment can be transferred with researchers or staff to their new unit or originating unit.
   - Equipment can be transferred to other units on campus.
     For both of these methods, refer to the UAPPOL procedure Equipment Asset – Transfer or Sale (Internal) to Another University Unit and complete the associated form. If there are costs associated with the physical movement of the equipment, this should be determined prior to signing the form. SMS-Distribution Services (Dispatcher) can be contacted to arrange the move.

2. **Donation of Equipment**
   Equipment can only be donated to registered charities. This often includes other teaching institutions and schools or charitable organizations.
   For this method, refer to the UAPPOL procedure Asset Disposal - Donation to Registered Charity and complete the associated form. Signatures must be obtained by the appropriate Vice President’s office depending on the source funding for the equipment prior to the donation.

3. **Selling University Equipment (External)**
   Equipment can only be sold to prospective buyers or advertised for sale through SMS-Surplus Services. All equipment sales are processed through Surplus Services to protect the University from conflicts of interest in selling University equipment assets.
   For this method, contact SMS-Surplus Services to request a surplus declaration number and coordinate the sale. SMS will process the sale and return proceeds to a unit’s general operating account. Proceeds cannot be deposited back into a research account.

4. **Surplus**
   Equipment deemed no longer useful, broken, impaired, or leftover can be picked up for removal by SMS-Surplus Services.
   For this method, a Surplus Disposal Form can be filled out. Contact SMS-Surplus Services to request a surplus declaration number and to coordinate the
pickup and removal. Tagged equipment assets picked up by Surplus will be removed from OEARs as long as they are tag numbers are recorded on the form.

5. Selling Equipment to Staff

   Computers, equipment, or furnishings may not be sold to University staff unless they are leaving the employment of the University by means of resigning, retiring, or position disruption. If this is the case, gifts can be made to departing staff. All University licensed software and intellectual property must be removed from the computers or other media devices prior to gifting.

   For this method, refer to the UAPPOL procedure Asset Disposal Form – Gift to Departing Staff and complete the associated form. A fair market evaluation is required by SMS-Surplus Services on any equipment/furniture and the total gift must not exceed $500.

Contact Information:

SMS Distribution Services Dispatcher – (780) 492-4122
To coordinate moves of equipment and furnishings

If you have any questions, please contact Equipment Services

Phone: 780-492-8895
Email: equipment.services@ualberta.ca
Website: www.sms.ualberta.ca/en/DistributionServices/EquipmentServices

*moveable equipment assets include tagged and tracked on the Online Equipment Asset Register (OEAR) and any untagged equipment. This guideline can also apply to office supplies and furnishings.