



Asset Management Technical Forum Agenda

Monday, September 21, 2026 | 4:00 PM - 5:00 PM

Omni Las Colinas | Las Colinas, TX

1. Welcome and Introductions- Sonia

- Roundtable introductions of forum participants

2. PI Onboarding, Offboarding, and Research Grants- Rick

- Managing the transfer of equipment for departing faculty
- Best practices for tracking assets tied to federal research grants
- Documentation needs, approvals, and institutional accountability

3. Operational Deep Dive: Donations- Jeff

- Handling complex donations, including vehicles, medical equipment, and other unique items
- Discussing when to decline a donation or accept it with liquidation as the intended path

4. Open Discussion and Q&A