



# ALES RESEARCH TIP SHEET #15

## Research Offboarding

### September 2024



This tip sheet supplements standard offboarding processes within each department and highlights research considerations. Please work with your Department/Faculty for non-research processes.

## 1. Leaving the UofA with no on-going affiliation (e.g. retiring, moving to another institution)

- Transfer the supervision of any remaining graduate students to a new supervisor.
- Ensure any personnel paid from grant funds are transferred to continuing funding sources or have their appointment terminated.
- Contact the ALES Research Team to go through research projects in your Researcher Home Page (RHP) to determine what will need to be done depending on sponsor terms and conditions and upon sponsor approval, for example:
  - PI changed to an eligible UofA co-PI
  - Grant transferred to a new institution (if PI is moving to a different eligible institution)
  - Grant closed out, remaining funds returned to the funder or department
- Ensure lab equipment is transferred to a new PI to manage (or discuss with your Chair), or [decommission and disposed](#). In some cases, if the PI is moving to another institution, they can request from the Faculty that equipment be [transferred to that institution](#).

## 2. Maintaining a non-staff affiliation with the UofA post retirement (e.g. Emeritus/Emerita)

- Contact your Department Chair and the ALES Dean for approval to continue to apply for and hold research funds (if desired). Note that the end date of the approval does not need to be specified for Emeriti professors.
- Ensure current graduate students have adequate supervision (e.g. a co-supervisor or complete transfer of supervision to another PI). New graduate students starting after the retirement date require co-supervision with a continuing staff appointment PI unless otherwise defined within the graduate program's supervisory policies and/or as approved by the Dean of the academic unit.

### ALES Research Team:

For more information and resources check the ALES Research webpage (intranet):

<https://intranet.ales.ualberta.ca/research/>

- Transfer supervision of any personnel paid from your research grants to a PI with a continuing staff appointment.
- Contact the ALES Research Team to go through research projects in your RHP to determine if anything will need to be done depending on sponsor terms and conditions and/or upon sponsor approval. Some possible actions that might need to be completed are:
  - PI changed to an eligible UofA co-PI with a continuing staff appointment
  - Project holder changed to the Department Chair (without changing the PI)
  - Grant closed out

### **3. Maintaining a non-staff affiliation with the UofA after moving to a different institution (e.g. Adjunct appointment)**

- Contact your Department Chair and the ALES Dean for approval to continue to apply for and hold research funds (if desired). Note that the end date of the approval would be the end date of the Adjunct appointment (typically 3-years).
- Ensure current graduate students have adequate supervision (e.g. a co-supervisor or complete transfer of supervision to another PI). New graduate students starting after the adjunct appointment date require co-supervision with a continuing staff appointment PI. Adjunct appointees' specific supervisory privileges are to be recommended, by the Dean of the academic unit, to the Vice-Provost and Dean (Graduate and Postdoctoral Studies (GPS)) via the [Supervisory Privileges Form](#).
- Transfer supervision of any personnel paid from your research grants to a PI with a continuing staff appointment.
- Contact the ALES Research Team to go through research projects in your RHP to determine if anything will need to be done depending on sponsor terms and conditions and/or upon sponsor approval. Some possible actions that might need to be completed are:
  - PI changed to an eligible UofA co-PI with a continuing staff appointment PI
  - Project holder changed to the Department Chair (without changing the PI)
  - Grant closed out