


**Date:** February 25, 2008

**To:** Pacific Gateway Workforce Investment Network Staff

**From:** Bryan S. Rogers  
WIB Executive Director 

**Subject:** **POLICY MEMORANDUM: WDB-02  
PROPERTY AND EQUIPMENT POLICY**

**EFFECTIVE DATE**

This policy is effective upon date of issue. It supersedes previous policy dated April 3, 2006.

**PURPOSE**

The purpose of this policy is to provide direction on effective control and accountability for real and personal property and other assets, to adequately safeguard all property, and to assure that its use is solely for authorized purposes. This includes maintenance of inventory for all property and equipment acquired with WIA funds.

**POLICY/PROCEDURES**

1. All property and equipment that is removed, transferred, or disposed of must be reported immediately to the Operations Officer by copy of a completed **Transfer and/or Disposal of Property and Equipment** (Attachment A) form from the Site Facility Supervisor.
2. The removal, transfer, or disposal of any property and equipment must go through the Site Facility Supervisor, and a **Transfer and/or Disposal of Property and Equipment** form must be completed *before* property or equipment can be removed from its original inventoried site. Failure to complete this form may result in personal financial responsibility for that particular item, and/or may result in disciplinary action. Any **Disposal** of property or equipment must be approved by the Executive Director along with completion of **Transfer and/or Disposal of Property and Equipment** form (**Attachment A**).
3. All property and equipment purchased with WIA funds must be used in the program or project for which it was acquired. When no longer needed for the original program or project, the equipment may be used in other activities currently or previously supported by a Federal agency. If this occurs, Operations Officer must be notified.



4. Appropriate measures must be taken to ensure adequate safeguards to prevent any loss, damage, or theft of the property and equipment. Any loss, damage, or theft must be reported to the Executive Director and Operations Officer, and shall be investigated as appropriate. All stolen items must be reported to the Police Department through the non-emergency contact line.

5. New purchases and replacement of property and equipment must be reported immediately to Operations Officer along with description, source of property and equipment, acquisition date, cost, location, use and condition of property and equipment. Disposition of property and equipment, whether acquired in whole or in part with grant funds will at minimum follow the requirements as set forth in the 29 CFR Subtitle A, 97.32 (d)(e).

6. A physical inventory of property and equipment will be taken and the results reconciled with the property and equipment records at least once every two years in accordance with WIA Property Management requirements. All equipment purchased with WIA funds will have a unique identification mark to be used for inventory purposes. The equipment records shall include the following information:

- A description of the equipment
- Manufacture's serial number, model number, WIA reference number
- Source of equipment, including the award number
- Title Holder
- Percentage of Federal Participation
- Acquisition date (or date received, if the equipment was furnished under WIA funds.
- Per unit cost at acquisition
- Records showing maintenance procedures to keep the equipment in good operating order.
- Location and condition of the equipment and the date the information was reported
- Disposition date, sale price, loss, theft, etc.

7. Every piece of equipment loaned (Laptops, Camcorders, VCR's, PC's, PC Projectors, Protection panels, Slide Projects, etc.) must have an Equipment Check-Out (Attachment B) form completed and approved by the Pacific Gateway Workforce Investment Network's Operations Division before equipment can be loaned out.

8. Personal computers belong to the City of Long Beach, and are not personal property. City equipment should only be used for completion of work-related assignments. Additionally, modifications to any PC are prohibited unless otherwise approved by the City of Long Beach's Technology Services Department.

Modifications include, but are not limited to:

- Renaming Operating Systems Files and Drives
- Installing Software (including games and screen savers)
- Deleting Software
- Attempting to Modify or Delete Shared Program Files
- Performing repairs on any malfunctioning Equipment
- Moving or adding hardware and related equipment
- Connecting or disconnecting Internet connections, local area (LANs), or wide area networks (WANs).

9. Property and equipment acquired with grant funds will not be used to provide services for a fee to compete unfairly with private companies that provide equivalent services, unless specifically permitted or contemplated by Federal statute.

10. Disposition of Equipment (WIAD03-9)

For equipment with a residual fair market value of \$5,000 or more, for equipment purchased with WIA funds the following guidelines must be followed (Title 29 CFR Part 97.32):

- The equipment may be used in the program or project for which it was acquired as long as needed, whether or not the project continues to be supported by federal funds.
- If the equipment is no longer needed by the original program/project, the equipment may be used in other activities currently or previously supported by a federal agency.
- If the equipment is nor longer needed by the program/project or for other activities currently or previously supported by a federal agency, the equipment may be retained or sold with reimbursement made to the state for the federal share of the equipment. The compensation due to the state is determined by multiplying the current fair market value or proceeds from the sale by the percent of WIA federal funds used in the equipment purchase. If only WIA federal funds were used for the purchase then the percentage would be 100 percent. If both WIA federal an local funds were used in the purchase then use the WIA federal funds percentage for the calculation. Actual and reasonable selling and handling expenses (\$500 or 10 percent of the proceeds of the sale, whichever is less) may be deducted from the proceeds of the sale. The balance of WIA federal funds must be submitted within 30 days to the address provided below. The name of the entity, subgrant number, year of appropriation, and funding stream must be provided when submitting the funds.

Funds received from the sale of equipment should be sent to the following address:

Fiscal Programs Division, MIC 70  
 Employment Development Department  
 P.O. Box 826217  
 Sacramento, CA 94230-6217

For property with a fair market value of less than \$5,000 the Network may retain, sell or dispose of the property and nothing needs to be reported to the State. A disposition record must be kept for any transaction in accordance with WIA record retention requirements.

Assistance:

If you need additional information or assistance, feel free to contact your immediate supervisor or Operations Officer.

**CONTACT**

Should you have any questions regarding this Policy Memorandum, please contact Arleen M. Ward at (562) 570-3680.

Thank you.

Attachments

BSR:mh

**PACIFIC GATEWAY WORKFORCE INVESTMENT NETWORK**

*ATTACHMENT A*

TRANSFER AND/OR DISPOSAL OF PROPERTY AND EQUIPMENT

\_\_\_\_\_ Transfer

\_\_\_\_\_ Disposal

Date: \_\_\_\_\_

Item Description:

\_\_\_\_\_

Serial Number:

\_\_\_\_\_

Transferred From:

\_\_\_\_\_

Destination:

\_\_\_\_\_

Purpose of Transfer/Disposal:

\_\_\_\_\_

\_\_\_\_\_

Condition of Property or Equipment: \_\_\_\_\_

\_\_\_\_\_

Name (Print) Office Supervisor

\_\_\_\_\_

Signature

\_\_\_\_\_

Name (Print) Receiver

\_\_\_\_\_

Signature

\_\_\_\_\_

Name (Print)

\_\_\_\_\_

Signature

Please note: This form is to be completed *whenever* property or equipment is removed from the inventoried site (office, cubicle, building, etc.) to another site (office, cubicle, building, etc.). For disposal of any property or equipment, \_\_\_\_\_ *must* sign.

**PACIFIC GATEWAY WORKFORCE INVESTMENT NETWORK**

*ATTACHMENT B*

EQUIPMENT CHECK-OUT

Date: \_\_\_\_\_

Item Description:

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Serial Number: \_\_\_\_\_

Purpose of Loan:

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Duration for Loan of Equipment:

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\_\_\_\_\_  
Name (Borrower) (Print)

\_\_\_\_\_  
Signature (Borrower)

\_\_\_\_\_  
Name (Information Systems Admin)(Print)

\_\_\_\_\_  
Signature (ISA)

Please note: Absolutely ***no equipment*** may be loaned to an employee without the completion of this form. Form shall be signed by the Borrower ***and*** the Equipment Supervisor. If a check-out form is not completed, this may result in employee losing the privilege of receiving equipment in the future, or may result in disciplinary action.

I acknowledge that I am (given the privilege of) checking out City/WIA equipment for my convenience in the completion of my work with the Pacific Gateway Workforce Investment Network. I understand that I am responsible for repayment of lost, stolen or damaged equipment while assigned to me and agree to reimburse the Pacific Gateway Workforce Investment Network for such loss. All stolen items must be reported to the Police Department.

It is the responsibility of the Borrower to ensure the completion and accuracy of this form.

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**EQUIPMENT RETURN VERIFICATION**

Date: \_\_\_\_\_

Condition of returned equipment:

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\_\_\_\_\_  
Name (Borrower) (Print)

\_\_\_\_\_  
Signature (Borrower)

\_\_\_\_\_  
Name (Equipment Supervisor) (Print)

\_\_\_\_\_  
Signature (Equipment Supervisor)