



POLICIES AND PROCEDURES

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PROCEDURE MANUAL

Accountability

Fleet and property accountability for Louisiana Delta Community College campuses encompasses, at a minimum, the following:

1. Provisions for processing new equipment and other movable property into the AMS inventory system
2. Provisions for validating the inventory on a systematic basis
3. Certification of the inventory on an annual basis
4. Provisions for the internal transfer of movable property, or for transferring externally within the LCTCS
5. Provisions for the temporary off-campus use of state-owned equipment
6. Provisions for disposing of unwanted and/or unusable movable property through AMS by submitting the items for transfer, surplus, scrap, or disassembly
7. Provisions for the proper use and care of all vehicles in inventory

Purchase of New Movable Property

The term “movable property” distinguishes this type of equipment from equipment that is attached as a permanent part of a building or structure. Movable property is distinguished from supplies in that supplies are consumable through normal use within one year’s time.

The Purchasing Department is responsible for the purchase of all new movable property, and for its subsequent receipt within the various campuses. The Purchasing Department and/or designee will provide the Property Manager copies of all relevant requisitions, purchase orders and other associated documentation for movable property immediately upon receipt, and before release to the requesting department. The Purchasing Department and or designee will not release any equipment for use until specifically authorized to do so by the Property Manager. Movable property will fit into one of two categories as follows:

1. Items whose original acquisition cost is less than \$1,000. Items in the first category do not have to be tagged into the inventory system, but at the Property Manager's discretion, they **may** be assigned a **white tag** inventory number and entered into AMS to ensure control of highly pilferable items
2. Items whose original acquisition cost is \$1,000 or greater. Movable property in this category **will** be assigned a **white tag** inventory number and entered into the AMS system within sixty days of receipt. Regardless of the cost, the Property Manager **will** assign a **white tag** inventory number to all desktop and laptop computers, and similar highly pilferable assets. Inventories of white tagged items will be performed on a regular basis, and a certified inventory will be conducted each year

Tagging Process

A color-coded tag system is used to identify classes and categories of movable property as shown below:

1. White tag – State tags sequentially numbered for movable property with an original acquisition cost of \$1000 or greater
2. Blue tag – unnumbered for movable property purchased through the Incumbent Worker Training Program regardless of cost
3. Yellow tag – unnumbered for movable property purchased with Carl Perkins funds when over \$1000 and tagged in category (1)
4. Yellow tag – sequentially numbered for non-consumable purchases under \$1000 purchased with Carl Perkins funds
5. Green or Red tag - unnumbered for movable property purchased with Rapid Response or Fast Start funds regardless of cost

Depending on the acquisition cost, a piece of movable equipment may have more than one tag assigned. To illustrate, a computer whose acquisition cost was \$1,250 and which was purchased with Carl Perkins funds would be given both a white and yellow tag.

The Property Manager will determine if an item is to be tagged. Upon receiving notification from the Purchasing Department that new movable property meeting the requirements for formal tracking has been received, the Property Manager and the Purchasing agent and/or designee shall agree on the appropriate purchase price to assign to the asset considering any additional costs associated with shipping, training, etc. The Property Manager shall then assign the next sequential white tag inventory number to the item. Pertinent data will be entered into the current fiscal year inventory acquisition log and the AMS system. At a minimum, the date, tag number, type of item, and location will be entered into the log. Movable property other than vehicles will be entered into AMS as "assets." Vehicles will be entered as such into a separate form.

Property is assigned to a responsible party at a specific location on each of the campuses. The location may be identified by the Property Manager designated location code, a building code, and a room number. For example, a welding machine might be located in

B103 - room 103 of the Trades/Industrial building on the West Monroe campus. Each LDCC campus has unique building identifiers, such as those shown for the West Monroe campus below.

Administration Building – S08958 (A)
Trades/Industrial Building – S08959 (B)
Automotive/CVO Building – S08960 (C)
Barber/Diesel Building – S08961 (D)

After the inventory log and AMS entries have been completed, the Property Manager will physically tag the new property with the appropriate tags in a conspicuous and easy to read location. The property will then be delivered to the proper department for installation and use.

Updating the Asset Management System Transfers:

Property may only be moved from one location to another on campus with the approval of the Property Manager. If property needs to be relocated on the campus the sending responsible party must obtain an ***Equipment Movement Form*** from the Property Manager. Once the form has been properly filled out and signed by the sending and receiving responsible parties, the Property Manager will approve or disapprove the move. If the move is approved, the Property Manager will update AMS accordingly.

The Property Manager must approve the transfer of movable property from LDCC campuses to other LCTCS organizations, any transfer to surplus, or any other method of disposal. The ***Equipment Disposal Form*** should be used to request transfer or disposal. If approved internally, the Property Manager will seek approval from LPAA. Movable property cannot be sent to surplus, otherwise transferred, dismantled, or scrapped without the express approval of LPAA.

Staff and faculty members who have movable property that is no longer needed or is unusable will initiate action to dispose of the property within the week it becomes known. The ***Equipment Disposal Form*** will be used for that purpose. The equipment will not be relocated or disposed of until permission is received from LPAA as described above.

Movable property in need of repair by an off-campus organization will be processed through the Property Manager using the ***Equipment Repair Form***. The transfer request should indicate the repairing entity and expected duration of the repair. The responsible party may send the property for repair only after approval is received from the Property Manager. When repairs are complete and the equipment back in place and in service, the responsible party will notify the Property Manager and the ***Equipment Repair Form*** will be closed out.

The Property Manager will review the Location Index and Responsible Persons lists at least annually and update the list when necessary. Copies of the updated Location Index lists will be forwarded to LPAA with a campus' annual certification letter.

Temporary Off Campus Use of Movable Equipment

Faculty and staff who have a need to use state property off campus, either on a long-term, routine basis, or for a single occasion, must fill out an ***Equipment Check-Out Form*** and submit it to the Property Manager. Upon approval, the property may be taken from the campus as required.

In the same way, an ***Equipment Repair Form*** must be filled out and approved by the Property Manager before any property is removed from the campus for repair or replacement under warranty.

Approval on a long-term or routine basis must be requested every calendar year and approval will be granted according to need. Approval for a single occasion must be requested, and granted, each time the need arises. When property is returned to campus after a single occasion use, the Property Manager must be notified so that the return can be logged on the form.

Faculty and staff who remove property from the campus are accountable for the reasonable safety of such equipment while it is in their possession. They should take all reasonable steps to protect the equipment. For example, laptop computers, projectors, cameras, and other like items should not be left in a vehicle overnight. Faculty and staff members who suffer the loss of state-owned equipment as a result of their negligence may be required to make restitution for that equipment.

Conducting the Annual Physical Inventory

At least thirty days prior to the annual inventory, a ***Notification of Inventory*** form must be completed and submitted to the Compliance Section of LPAA. Notice will also be given to each department head within the campus conducting the inventory, and a preliminary copy of the department's assets, listed by location, will be provided for review. It is the responsibility of the department head, individual faculty member, or staff member to always know the location of the assets for which they are accountable.

The certifiable physical inventory will be conducted by department heads and/or responsible parties. A working copy of the Certification Asset List will be provided. It should be used to record discrepancies of any kind. Situations where a location or responsible party needs to be changed, a tag is missing, or where the property needs to be disposed of should be recorded. The Property Manager will make all pertinent entries in AMS and initiate any other action necessary based on the discrepancies noted.

The Property Manager will then prepare a ***Certification of Annual Property Inventory*** form using the results of the physical inventory. The original form will be submitted to LPAA for approval and a copy sent to the Legislative Auditor. An additional copy will be maintained in the Property Manager's files for the current year and for three additional years at a minimum. When approval of the certification is received, it will be filed with and maintained in the same manner as the certification itself.

If the Annual Property Inventory reveals that one or more items are unlocated, the Property Manager will report their status to LPAA via the AMS system. These assets will be placed in a suspense location for a period of three years. During that time, the Property Manager will oversee an effort to locate the items as half of all missing items are eventually located within the three-yea r period. If missing items are found, the Property manager will enter their new location into AMS and the assets will be removed from the suspense location. If, at the end of three years, the missing items have not been found, the Property Manager will request that they be removed from inventory.

Review of Campus Monthly Reports

The Property Manager and/or their designee will run the following reports from AMS within ten working days of the end of each month:

1. Additions Report (By Creation Date)
2. Deletions Report
3. Monthly Transfer Report – From Me and Transfer Details
4. Late Additions Report

These reports will be maintained as part of the Property Manager's official records and will be reviewed by LPAA during their audits. Each Campus Administrator, or a subordinate specifically designated by the Administrator, will review the monthly reports to ensure that property is being tagged in accordance with LPAA regulations and these procedures. Internal Audits

In addition to the regular inventories conducted on each campus, the Property Manager will make periodic spot-check audits on the individual campuses. He will select an adequate number of items from the campuses' property records and audit them as to location, cost, proper and timely tagging, etc. The Property Manager will report his findings to the Purchasing Director.

Fleet Vehicles

The Fleet Manager is charged with ensuring that state owned vehicles are tagged as movable property. He or she will also ensure that routine vehicle inspections are conducted, that suggested maintenance is carried out, and that the vehicles are kept clean. In addition, the Fleet Manager will make sure that all required and appropriate documents are in the vehicle, and all required decals and stickers are on the exterior of the vehicle.

The Fleet Manager, or a designated representative, will place copies of the ***Daily Vehicle Log (MV-3)*** into the vehicle on the first day of each calendar month and monitor vehicle users to ensure the forms are filled out correctly. The Fleet Manager will review the MV-3 to find any discrepancies and to complete any required data fields. He will then enter appropriate mileage, fuel, and maintenance data into the AMS system.

If a vehicle is to be personally assigned to an LDCC employee on any campus, the Fleet Manager will make sure a ***Personal Assignment Agreement (MV-2)*** form is executed, signed, and approved by the Commissioner of Administration.

Pool vehicles are to be checked out on a daily basis. Reservations for vehicles can be requested in the gofmx program and approved by the Fleet manager or another designated person.

With permission from the Fleet Manager, Dean or Assistant Dean, Director or Assistant Director, faculty/staff members who are required to depart before normal working hours may take their reserved vehicle home overnight to facilitate efficiency. Members who are scheduled to return after normal working hours may keep the vehicle at home overnight and return it at the start of the working day the next morning.

If travel is to begin before normal working hours on a Monday morning the vehicle can be picked up the Sunday evening prior to travel. If a member returns after normal working hours on a Friday, the vehicle may be returned on Saturday morning. Exceptions to this policy must be approved by the Fleet Manager or Vice Chancellor of Finance and Administration.

Common courtesy must be observed by all faculty and staff members when using a state owned vehicle. The user should ensure that the vehicle is clean upon return, and that the fuel tank is at least $\frac{3}{4}$ full.

Authorized Drivers

The Campus Safety Coordinator will develop and publish a list of authorized drivers as often as necessary to keep the list current. Authorized drivers must meet all of the state level requirements set forth in the Office of Risk Management and LDCC Loss Prevention Manuals.