

CHABOT- LAS POSITAS COMMUNITY COLLEGE DISTRICT

**Surplus Program
Policies and Procedures**



Purchasing and Warehouse Services Department

Accounting Department

District Office

7600 Dublin Blvd., 3rd Floor

Dublin, California 94568

CHABOT- LAS POSITAS COMMUNITY COLLEGE DISTRICT

Surplus Program Policies and Procedures

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EXHIBITS:

1. Disposal of District Equipment form
2. Instructions for Completing the Disposal of District Equipment form
3. Letter of Interest to Donate to other School Districts
4. Equipment Transfer form
5. Education Code Section 81452

ADMINISTRATIVE RULES AND PROCEDURES

I) Private Sale of Personal Property

In accordance with the provisions of the Education Code, it shall be the policy of the Board of Trustees that personal property belonging to the District which is no longer suitable or required for college purposes may be sold at private sale without advertising. Such sales are subject to a prior determination by the Board of Trustees, by majority vote of those present, that the property to be sold has a value of less than the amount specified in Education Code Section 81452 (currently \$5,000).
(Board Policy 6550)

II) Board Policy 6550

Pursuant to the provisions of Board Policy 6550, the Chancellor's designee is authorized to dispose of personal property and equipment owned by the District which is no longer suitable or required for District purposes. The following procedures shall govern the disposal of such property:

- a) A Request for Disposal of District Equipment form (Exhibit 1) must be completed by the end user and then forwarded to the appropriate Department Chair/Dean or Manager for signature.
- b) An FF&E item value determination will be made prior to any sale offering. Individual items of equipment with a valuation in excess of the amount specified in Education Code Section 81452 will be referred to the Board of Trustees for sale in accordance with Board Policy 3212.
- c) Equipment is sold on an "as is" basis. Buyers shall remove equipment from the District's premises within one (1) week from the date of sale and full payment of the agreed upon purchase price. A bill of sale will be furnished upon request.
- d) The District reserves the right to reassign property and equipment to another area of the District where it may serve a useful purpose or as a trade-in on new equipment.

III) Program Structure

The program is structured to provide centralized purchasing and warehouse responsibility and authority to allow for a streamlined approach to remove and sell personal property of the District. The roles below are used to implement the Surplus Program and are shown in the chart on page 3.

- a) End Users - Those individual employees, on behalf of their department, who have deemed the property as no longer suitable or required for college purposes.
- b) Approvers - The end user's Department Chair/Dean or Manager who will approve the Request for Disposal of District Equipment form (Surplus Form).
- c) College Business Office –Reviews and forwards college-originated Surplus Forms to the warehouse.
- d) Business Services Senior Administrative Assistant – Organizes Surplus Forms received for District property. Forwards Surplus Forms to the warehouse.
- e) Purchasing and Warehouse Services – Warehouse lead receives Surplus Form and determines what needs to be done regarding the pickup and disposal of surplus property.
- f) District Accounting Department – This individual creates the Board Agenda item for Board approval for all surplus property for any given month. After Board approval, deletes any fixed asset from Banner.

IV) Procedures

- a) A Request for Disposal of District Equipment form (Exhibit 1) must be completed by the end user and then forwarded to the appropriate Department Chair/Dean or Manager for signature. **If an item is a fixed asset, the CLPCCD bar code number must be included on the form. This number can be found on the fixed asset tag.**
- b) At the colleges, the form is forwarded to the college Business Office. If the form originates within the district office the form should be sent to the senior administrative assistant for Business Services.
- c) The college Business Office or the senior administrative assistant for Business Services will forward a copy of the Surplus Form to the college warehouse.
- d) The Warehouse will initial the form and forward the form to the District Accounting Department. Arrangements will then be made for removal of the surplus property to the

District's warehouse or designated area for storage pending disposition. Warehouse staff will assess whether the property is useful or not. Some items are recycled, some are auctioned, and some are trashed. For items that are useful, purchasing takes pictures and uploads the pictures to a website. A link is sent out to district departments so that they can claim items. Anything not claimed is stored at the warehouse for district employees to peruse and repurpose for about 6 months. After that, items are auctioned.

- e) District Accounting Department – When the Accountant receives the Surplus Forms, (s)he creates a list of surplus items that will go to Board for approval the coming month. (S)he will also create the Board Report to corresponds to the list of items for approval.
- f) Board Approval – Once the Board approves the list of items for surplus, the Accountant will forward the approved list to the warehouse indicating the items that can now be disposed of. If there are any fixed assets on the list, the Accountant will remove those items from the Fixed Assets module.

Frequently Asked Questions

1) Where can I get a Request for Disposal of District Equipment Form?

The Request for Disposal of District Equipment form can be found on the Business Services Guide. (http://www.clpccd.org/business/documents/SurplusEquipment_000.pdf)

2) How do I complete a Request for Disposal of District Equipment Form?

All requests **must** be completed on the form Request for Disposal of District Equipment. The instructions are found attached to this document as Exhibit 2. If any information is missing, the form may be returned to you in order for you to fill in the missing data. This might result in a delay for the removal of the equipment.

3) How do I transfer equipment/furniture from one location to another?

Departments may request the transfer of useable equipment within District's department by properly filling out the Equipment Transfer form. Equipment which originally cost less than

\$5,000 (i.e. is not a fixed asset) may be transferred to another department without the use of the Equipment Transfer form. However, equipment whose original cost was greater equal to or greater than \$5,000 (i.e. a fixed asset) will require a completed Equipment Transfer form. Equipment Transfer forms should be sent to the Warehouse prior to removal from the department so that the warehouse is aware of the move.

Note*** It is the end user's responsibility to transfer any equipment/furniture from one location to another. If help is needed to move the equipment/furniture, please contact M&O staff to coordinate the move. Warehouse staff do not transfer property.

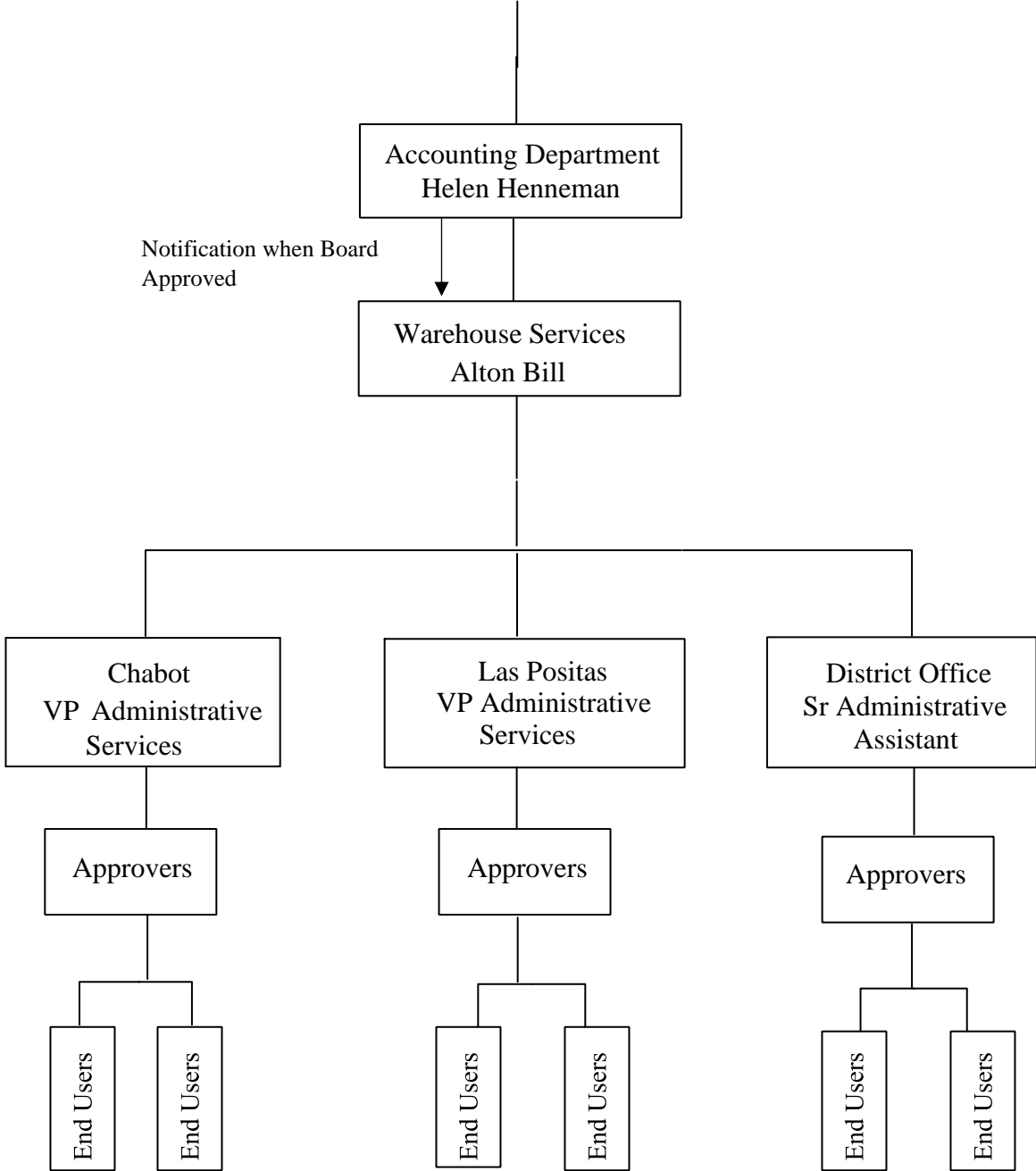
4) How do I request that certain surplus items be donated to another school/college or to a local nonprofit?

All items will first be offered to the rest of the district through pictures on a website (see IV(d) above). Once the district departments have had first choice of the items, if a school/college/nonprofit has been identified as an organization that can use CLPCCD's surplus, they should send a letter of interest on their letterhead to someone in the district 1) requesting the specific surplus items, 2) how and when they will pick up the items, and 3) if the organization is a 501(c)3, provide the EIN number of their organization.

5) How do I process a trade-in?

Follow IV) Procedures above. Once the item has been approved by the Board for trade-in, then the new transaction can take place.

District Surplus Program – Surplus Form Flow
Chancellor, Ronald Gerhard
Vice Chancellor, Business Services, Jonah Nicholas



ORGANIZATIONAL ROLES AND RESPONSIBILITY

The Surplus Program has organizational roles and responsibilities for participants as described below.

I) End User – Department

The end user of each college's department or district department shall determine whether the designated surplus FF&E (furniture, fixture and equipment) is no longer suitable for instructional or administrative needs of the District. The end user will fill out the Request for Disposal of District Equipment form and then forward to the appropriate Department Chair/Dean or Manager for review and approval. If the item(s) are to be donated, the End User can suggest the recipient donee.

II) Approvers - Department Chair/Dean or Manager

The end user's Department Chair/Dean or Manager will review and approve the Request for Disposal of District Equipment form. A copy should be saved in the department of origin. The approved form should be sent to the college Business Office. If it is District Office equipment, then the approved form should be sent to the Business Services Senior Administrative Assistant.

III) College Business Office/Business Services Sr. Administrative Assistant

The college Business Office/Business Services Sr. Administrative Assistant will review the Surplus Form for completeness. The reviewed form will be sent to the appropriate warehouse. If it is district office equipment, the Business Services Senior Administrative Assistant will forward a copy of the form to the warehouse and then coordinate with the warehouse for pickup.

IV) District's Purchasing and Warehouse Services

Upon receipt of a completed Surplus Form, the warehouse will identify the location of the individual items of equipment, then coordinate the removal and storage of the equipment at the Butler Building. The items are then examined to determine their usefulness. For the useful items, the warehouse will take pictures of those items and email the pictures to district departments in order to see if the items can be used elsewhere within the district. The items chosen by another department will then be relocated to the new location.

Upon approval by the Board of Trustees, the warehouse will:

- a) if donated to other School Districts in the local service area or to a non-profit organization, assist the donee in previewing the items and in the pick-up of selected items;
- b) sell the items to the public via online auction (if there is residual value). The warehouse will arrange the pick-up of the items with the buyer within one week of the date of sale and perform the sales transaction for the full payment of the purchase price (a bill of sale will be furnished upon request); or
- c) properly dispose of the items. The district uses a local recycling services provider to recycle items not sold or donated.
- d) notify Accounting regarding the means of disposal of any fixed asset as soon as possible in order for Accounting to know how to record the disposal of the fixed asset in Banner (e.g. donated, lost, sale, stolen, trade-in, trash). Without these instructions, the fixed asset will be marked as “trash” in Banner.

V) District’s Accounting Department

Upon receipt of a completed Surplus Form, Accounting will:

- a) create a list of items to be disposed of in the upcoming month. Based on the description and condition provided on the Surplus Form, an estimate of the residual value of each item will be determined and included on the list of items. A Board agenda item, Approval of Declaration of Surplus Property to be Sold at Private Sale and Donation or Disposal of Any Items Not Sold, will be created. The list will be attached to the Board Agenda Item.
- b) forward the Board Action/Surplus list to the warehouse once Board approved.
- c) review the 501(c)3 status of a nonprofit, if donated.

DISPOSITION OF SURPLUS EQUIPMENT PROCEDURE CHABOT-LAS POSITAS COMMUNITY COLLEGE DISTRICT

Procedure: All requests **must** be completed on this form "Request for Disposal of District Equipment". Please be sure to keep the "green" copy of the Form for your records. This is an important document in the event you need to track or follow-up on the removal of equipment. Moreover, for additional Forms, please contact your Vice President of Business Services for your College.

Step 1. This Form must be completed. If information is missing it may be returned to you to complete the missing data, thereby delaying the removal of the equipment.

Furthermore, on the Form please be aware of sections that are identified as "Mandatory" and therefore must be completed.

- | | |
|---------------------------------------|---|
| A. Date: | Mandatory. Date which form was completed. |
| B. Building Location
& Room Number | Mandatory. Area where equipment is located to be picked up. |
| C. Quantity: | Mandatory. Number by type of equipment that will need to be picked-up. |
| D. Description | Mandatory. Describe what the item(s) are e.g., Metal Desk, Lateral File Cabinet, Computer Monitor. Please be specific. |
| E. Model # | Information is usually listed on the side or underneath the piece of equipment being surplused. |
| F. Serial #/VIN # | This information is usually listed on the side or underneath the equipment. |
| G. CLPCCD Barcode | Mandatory. The Asset Tag is usually on the side of the piece of equipment being surplused. |
| H. Condition | Please identify in this column if the equipment is Poor, Fair, Good. |
| I. Operational | Please identify in this column if the equipment is Operational, Yes or No. |
| J. Signature | Mandatory. Please be sure to sign. |
| K. Printed Name | Mandatory. Please be sure to print your name. |
| L. Extension | Mandatory. We may need your phone extension to schedule a pick-up or get a hold of you. |
| M. Division or Area | Mandatory. |
| N. Chair/Dean | Mandatory. |
| O. VP Business
Services | Mandatory. |

Step 2. Form is then to be forwarded to the appropriate Department Chair/Dean for signature (section N).

Step 3. Form is then sent from the Dean/Chair to the Vice President of Business Services for College (section O) for signature.

Step 4. Form will forward then to the District Purchasing Manager.

Step 5. Purchasing Manager will coordinate pick-up through Warehouse Staff.

81452. (a) If the governing board, by a unanimous vote of those members present, finds that the property, whether one or more items, does not exceed in value the sum of five thousand dollars (\$5,000), the property may be sold at private sale without advertising, by any employee of the district empowered for that purpose by the board.

(b) Any item or items of property having previously been offered for sale pursuant to Section 81450, but for which no qualified bid was received, may be sold at private sale without advertising by any employee of the district empowered for that purpose by the board.

(c) If the board, by a unanimous vote of those members present, finds that the property is of insufficient value to defray the costs of arranging a sale, the property may be donated to a charitable organization deemed appropriate by the board, or it may be disposed of in the local public dump on order of any employee of the district empowered for that purpose by the board.