



OET WORKFORCE POLICY — PROPERTY CONTROL FOR EQUIPMENT PURCHASED WITH GRANT FUNDS

VERSION NUMBER: 01-WPL-24
EFFECTIVE DATE: OCTOBER 1, 2024 **LAST UPDATE:** N/A
PROGRAMS IMPACTED CLIMATE AND EQUITABLE JOBS ACT WORKFORCE PROGRAMS (CEJA)
JOB TRAINING AND ECONOMIC DEVELOPMENT (JTED)

I. ISSUANCES AFFECTED

References:

2 CFR Part 200, Uniform Administrative Requirements, Cost Principles, and Audit Requirements for Federal Awards

Rescissions:

None

II. POLICY

This policy guides the management and control of equipment purchased with grant funds by grantees. This includes the acquisition, inventory control, disposition, and reporting of equipment the grantee holds. These procedures are established to comply with federal regulations regarding equipment for which the grantee is responsible and accountable.

All equipment purchased with grant funds shall be maintained and managed following the property standards in the Uniform Guidance at 2 CFR 200.310-316, the terms of the grant agreement, the requirements outlined in the grant manual and other guidance issued by the Department as applicable.

1. Acquisition of Equipment

- a. Equipment is defined as an article of tangible personal property with a useful life of more than one (1) year and a per-unit acquisition cost that equals or exceeds \$10,000.
- b. Equipment acquired through purchase or lease-purchase with a unit purchase price of \$10,000 or more shall require prior approval from the Office of Employment and Training (OET).
 - 1) The grantee must request approval and documentation of the results of the procurement action for OET.

- 2) Approval of the budget as awarded does not constitute approval; items will still need authorization.
 - c. Standards used in determining whether to approve purchases include the necessity of such purchases to achieve program goals, the planned *expenditure* for such purposes compared to other available prices and funding availability.
2. Inventory Control
 - a. Grantees shall comply with the property standards in the Uniform Guidance for all inventory units of equipment with an acquisition cost that equals or exceeds the lesser of the capitalization level established by the subrecipient for financial statement purposes or \$10,000.
 - 1) These property standards require, among other things, property records that include all the items in 2 CFR 200.313(d)(1); a physical inventory taken, and results reconciled with the property records every two (2) years; a control system to ensure adequate safeguards to prevent loss, damage, or theft; and proper maintenance procedures to keep the property in good condition.
 - b. Grantee shall inform the Department of any property location changes for all equipment with an acquisition cost of \$10,000 or more.
 - c. Per the grantee's fiscal policy and procedures, grantees shall also be responsible for inventory units of other tangible assets with an acquisition cost of up to \$9,999.
 - d. Records shall be maintained per the federal property standards in the Uniform Guidance at 2 CFR 200.310-316.
3. Lost, Damaged or Stolen Equipment
 - a. When loss, damage, or theft to grant property occurs, the Grantee shall forward a Report of Lost, Damaged or Stolen Equipment Form to the Department within ten (10) days of discovering the loss, damage, or theft. (See the Forms & Instructions tab.)
 - b. In the case of stolen property, a police report must accompany the report to OET or a fire department report for fire-damaged property.
4. Disposition of Equipment
 - a. Equipment Equal to or Greater Than \$10,000
 - 1) OET must be contacted for disposition instructions for equipment with an acquisition cost of \$10,000 or more when the grant relationship ends, or the grantee no longer needs the property.
 - 2) This notification shall be given via the Report of Excess/Unserviceable Equipment Form. (See the Forms & Instructions tab.)

- 3) Equipment with an acquisition cost of \$10,000 or more may not be transferred from the control of the subrecipient without written approval from the Department.
 - 4) If authorized or required to sell the equipment, proper sales procedures must be established to ensure the highest possible return.
- b. Supplies and other tangible assets with an acquisition cost of less than \$10,000 may be acquired and disposed of at the grantee's discretion per its fiscal policy and procedures.

III. INQUIRIES

Direct inquiries to your assigned Regional Administrator or Grant Manager.

IV. ATTACHMENTS

OET Workforce Equipment Relocation Form and Instructions
OET Workforce Inventory Control Form and Instructions
Report of Excess/Unserviceable Equipment Form and Instructions
Report of Lost, Damaged or Stolen Equipment Form and Instructions

Sincerely,

A handwritten signature in black ink, appearing to read 'Julio Rodriguez', with a stylized flourish at the end.

Julio Rodriguez, Deputy Director
Office of Employment and Training

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OET Workforce Equipment Relocation Form Instructions

1. Date Enter the current date in the MM/DD/YYYY format.
2. Grant Recipient Name Enter the name of the grant recipient.
3. Subrecipient Name Enter the name of the subrecipient that owns the equipment (if applicable).
4. Address Enter the address of the grant recipient/subrecipient.
5. Phone Enter the phone number, including the area code, of the grant recipient/subrecipient.
6. Email Enter the email of the grant recipient/subrecipient.
7. Previous Location of Equipment Enter the location of the equipment before it was relocated (i.e., address if different from above, room number, floor, etc.).
8. New Location of Equipment Enter the location of the equipment after it was moved (i.e., address if different from above, room number, floor, etc.).
9. Brief Description of Equipment Enter a brief description of the equipment being relocated.
10. Signature of Grant Recipient/Subrecipient Property Officer The current Grant Recipient/Subrecipient Property Officer must sign the form.
11. Date Enter the date the Grant Recipient/Subrecipient Property Officer signs the form in the MM/DD/YYYY format.

OET Workforce Equipment Relocation Form

1. Date: _____

Contact Information

2. Grant Recipient Name: _____	
3. Subrecipient Name: _____	
4. Address: _____	
5. Phone: _____	6. Email: _____

Equipment Description

7. Previous Location of Equipment:
8. New Location of Equipment:
9. Brief Description of Equipment:

10. Signature of Grant Recipient/Subrecipient Property Officer _____

11. Date _____

OET Workforce Equipment Inventory Control Form Instructions

1. Date Enter the current date in the MM/DD/YYYY format.
2. Grant Recipient Name Enter the name of the grant recipient.
3. Subrecipient Name Enter the name of the subrecipient that owns the equipment (if applicable).
4. Address Enter the address of the grant recipient/subrecipient.
5. Phone Enter the phone number, including the area code, of the grant recipient/subrecipient.
6. Email Enter the email of the grant recipient/subrecipient.
7. Brief Description Enter a brief description of the equipment.
8. Location of Equipment Enter the equipment's location (i.e., its address if different from above, room number, floor, etc.).
9. Serial # Enter the serial # of the equipment. Put N/A if the equipment does not have a serial number.
10. Purchase Price Enter the purchase price of the equipment.
11. Date of Purchase Enter the date the equipment was purchased in the MM/DD/YYYY format.
12. Condition of Equipment Enter the condition of the equipment when it was acquired by selecting whether it was new or used in the checkbox.
13. Vendor Name and Address Enter the name and address of the vendor from which the equipment was purchased.
14. Source of Funding Enter the source of the funding.
15. Who Holds Title Enter the name of the entity that holds the title of the equipment.
16. Signature of Grant Recipient/
Subrecipient Property Officer The current Grant Recipient/Subrecipient Property Officer must sign the form.
17. Date Enter the date the Grant Recipient/Subrecipient Property Officer signs the form in the MM/DD/YYYY format.

OET Workforce Equipment Inventory Control Form

1. Date: _____

Contact Information

2. Grant Recipient Name: _____	
3. Subrecipient Name: _____	
4. Address: _____	
5. Phone: _____	6. Email: _____

Equipment Description

7. Brief Description: 			
8. Location of Equipment: 			
9. Serial #: _____	10. Purchase Price: _____	11. Date of Purchase: _____	12. Condition of Equipment: <input type="checkbox"/> New <input type="checkbox"/> Used
13. Vendor Name and Address: _____			
14. Source of Funding: _____			
15. Who Holds Title: _____			
16. Signature of Grant Recipient/Subrecipient Property Officer		17. Date	

FOR OET USE ONLY

OET approval letter on file? Yes No

Date of Letter: _____

On-site verification date: _____

Monitor Name: _____

Phone: _____

OET Staff's Comments:

OET Staff's Signature

Date

Report of Excess/Unserviceable OET Workforce Equipment Form Instructions

1. Date Enter the current date in the MM/DD/YYYY format.
2. Grant Recipient Name Enter the name of the grant recipient.
3. Subrecipient Name Enter the name of the subrecipient that owns the equipment (if applicable).
4. Address Enter the address of the grant recipient/subrecipient.
5. Phone Enter the phone number, including the area code, of the grant recipient/subrecipient.
6. Email Enter the email of the grant recipient/subrecipient.
7. Location of Equipment Enter the equipment's location (e.g., its address if different from the one above, room number, floor, etc.).
8. Brief Description of Equipment Enter a brief description of the equipment from the OET Workforce Inventory Listing.
9. Serial # Enter the serial # of the equipment. Put N/A if the equipment does not have a serial number.
10. Acquisition Date Enter the date the equipment was acquired.
11. Acquisition Cost Enter the purchase price of the equipment when it was acquired.
12. Condition of Equipment Enter a description of the current condition of the equipment.

Report of Excess/Unserviceable OET Workforce Equipment

1. Date: _____

Contact Information

2. Grant Recipient Name: _____	
3. Subrecipient Name: _____	
4. Address: _____	
5. Phone: _____	6. Email: _____

Equipment Description

7. Location of Equipment: _____				
8. Brief Description of Equipment from OET Workforce Inventory Listing	9. Serial #	10. Acquisition Date	11. Acquisition Cost	12. Condition of Equipment

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OET Staff's Recommendation for Disposition:

OET Staff's Signature _____		Date _____
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Report of Lost, Damaged or Stolen Equipment Form Instructions

1. Date Enter the current date in the MM/DD/YYYY format.
2. Grant Recipient Name Enter the name of the grant recipient.
3. Subrecipient Name Enter the name of the subrecipient that owns the equipment (if applicable).
4. Address Enter the address of the grant recipient/subrecipient.
5. Phone Enter the phone number, including the area code, of the grant recipient/subrecipient.
6. Email Enter the email of the grant recipient/subrecipient.
7. Type of Incident Enter the type of incident. If other is checked, provide a brief explanation.
8. Explain the circumstances associated with the loss Provide an explanation of the equipment loss. Include the date, time and the name of the person who discovered the loss.
9. Location of equipment at time of loss Enter the equipment's location at the time of loss (e.g., its address if different from above, room number, floor, etc.).
10. Brief Description of Equipment Enter a brief description of the equipment from the OET Workforce Inventory Listing.
11. Serial # Enter the serial # of the equipment. Put N/A if the equipment does not have a serial number.
12. Acquisition Date Enter the date the equipment was acquired.
13. Acquisition Cost Enter the purchase price for the equipment when it was acquired.
14. Condition of Equipment Enter the last known condition of the equipment prior to the loss.
15. Insured Coverage Indicate if the equipment was covered by insurance at the time of the loss. Include the insurance carrier, policy number, and the carrier's intent to replace the equipment.
16. Uninsured Coverage If the equipment was not insured at the time of the loss, indicate how the loss will be financially repaid.

Attach a Copy of the Police, FBI, or Fire Department Report (if available)

17. Signature of Grant Recipient/Subrecipient Property Officer The current Grant Recipient/Subrecipient Property Officer must sign the form.
18. Date Enter the date the Grant Recipient/Subrecipient Property Officer signs the form in the MM/DD/YYYY format.

Report of Lost, Damaged or Stolen Equipment

1. Date:

Contact Information

2. Grant Recipient Name:	
3. Subrecipient Name:	
4. Address:	
5. Phone:	6. Email:

Details of Incident

7. Type of Incident: <input type="checkbox"/> Theft <input type="checkbox"/> Fire <input type="checkbox"/> Accident <input type="checkbox"/> Other (indicate)				
8. Explain the circumstances associated with the loss, indicating the date, time, and person's name discovering the loss:				
9. Location of equipment at the time of loss:				
10. Brief Description of Equipment from OET Workforce Inventory Listing	11. Serial #	12. Acquisition Date	13. Acquisition Cost	14. Condition of Equipment
15. Was the equipment loss covered by insurance? <input type="checkbox"/> Yes <input type="checkbox"/> No (If yes, indicate insurance carrier, policy number, and intent to replace).				
16. If the loss was uninsured, how will the loss be financially repaid?				

Attach a Copy of the Police, FBI, or Fire Department Report (if available)

 17. Signature of Grant Recipient/Subrecipient Property Officer 18. Date

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OET Staff's Comments: