

CSU Channel Islands Property Survey Board Guidelines

Each campus is required to have a Property Survey Board (PSB) in accordance with State Administrative Manual (SAM) section 3520. This section of SAM is included as Attachment A*. The responsibilities of the property board are for determining that, when disposing of surplus property, the decision to do so serves the best interest of the campus.

The CI PSB will meet as needed to review requests that come forward to identify property as surplus. When any property is proposed as surplus a form (either the Property Survey Report (STD 152) used by the State or a similar form created for campus use) must be submitted for committee review. The committee's primary responsibility is to determine if another Division or department may have use for the property and if so, consult with them. Sometimes, a decision must be made quickly. Any 2 members of CI PSB are authorized to approve all Property Survey Reports. A list of Committee members is included as Attachment B.

Once property is identified as surplus it may be donated to a non-state agency or offered for public sale. If the property is to be sold, it must be a public sale that is advertised in the local newspaper at least one week in advance and run no less than 3 days in a row. The property may also be advertised via other public forums, including websites established for such a purpose, i.e. PublicSurplus.com.

If surplus property is determined to be unsellable, it can be scrapped. As indicated in the Signature Delegation and Acceptance document, Vice President of Finance and Administration delegated the authority for the Property Coordinator to certify in writing that the disposition has been accomplished. If the property is disposed of at a public, attended land fill, the attendant's signature should also be obtained.

Signatures on file in Accounting Office

Emily A. Deakin, Controller

Joanne Coville, VP for Finance and
Administration

*Note: J Coville discussed with J Mirza on 3/1/2005 and determined that the references to the State (Department of General Services, State and Federal Property Reuse Program Office, etc.) do not apply to the CSU. Each CSU campus is required to adopt a similar process, but all of the processing and approvals are within the campuses authority.

Cc: Property Board Members

Noel Buena, Property Coordinator

Attachment A

Excerpts from the Statewide Administrative Manual

3520 DISPOSAL OF SURPLUS PERSONAL PROPERTY (Revised 12/03)

Prior to an agency's disposal of any state-owned personal surplus property, other than vehicles and mobile equipment (See SAM Sections 4171 through 4175 for Disposition of Vehicles and Mobile Equipment), the agency must obtain approval from the State and Federal Property Reuse Program Office, Procurement Division, Department of General Services.

The agency must submit to the State and Federal Property Reuse Program Office a Property Survey Report STD. 152 requesting direction and approval prior to disposition of any state-owned personal surplus property, including general office furniture, regardless of the original acquisition value or if the property was recorded or capitalized for accounting purposes. The \$5,000 unit acquisition cost requirement for capitalization does not apply to disposal actions. Final disposition, which includes sale, trade-in, discarding or turning the property over to the State and Federal Property Reuse Program Office, or discarding the property may not occur until the State and Federal Property Reuse Program Office approves the disposition.

To request approval, the agency faxes the completed Property Survey Report (STD. 152), to the State and Federal Property Reuse Program Office, either in Sacramento at (916) 928-4644, or Southern California at (714) 449-5917. This reporting requirement applies to all office furniture items, including (but not limited to) bookcases, cabinets, chairs, credenzas, desks, shelving, tables, and similar items common to state offices.

The State and Federal Property Reuse Program Office facilitates and ensures recycling of used office furniture that is sound and, therefore, reusable, thus contributing to reducing expenditures for new furniture and conserving the materials used in the manufacture of office furniture.

3520.2 PROPERTY SURVEY BOARD (Revised 9/03)

Each agency will have a duly appointed Property Survey Board that is responsible for determining that, when disposing of surplus property, the decision to do so serves the best interest of the state. To the extent possible, there will be a sufficient number of members on the Board to insure representation by both business management and program responsibilities. At least two Board members must approve all Property Survey Reports (STD. 152) and all Transfer of Location of Equipment (STD. 158).

3520.3 PROPERTY SURVEY REPORTS (Revised 9/03)

When an agency proposes to dispose of state-owned, nonexpendable surplus property by sale, by trade-in, or by turning it over to the State and Federal Property Reuse Program Office, or by discarding the property, the agency prepares a Property Survey Report (STD. 152) and submits it to the State and Federal Property Reuse Program Office for approval.

When an agency proposes to transfer such property to another agency or to a unit within the agency, the agency prepares a Transfer of Location of Equipment (STD. 158) and submits it to the State and Federal Property Reuse Program Office

for approval. The agency may use an agency form in lieu of the STD. 158 for intra-agency transfers between organizational units accounted for in the same general ledger account.

The agency retains the original copy of the approved STD. 152 or STD. 158, as applicable, in a suspense file, pending final disposition of the property. If the agency sells the property, the agency enters the dollar amount received from the sell and the receipt number on STD. 152, and disposes of the listed property without delay.

The requesting agency and the State and Federal Property Reuse Program Office retain copies of all STD. 152's and 158's in accordance with the general disposition schedule. See SAM Section 1671.

3520.4 TRANSFER TO THE SURPLUS PROPERTY PROGRAM OFFICE

(Revised 9/03)

When state-owned surplus personal property is not to be transferred within an agency, the agency submits a STD. 152 directly to the State and Federal Property Reuse Program Office.

The agency must provide adequate information in the "explanation" section of the STD. 152, and indicate the reason(s) for disposal of the property.

The agency must use a single STD. 152 only for similar items or items being surveyed for the same reason. The agency must use separate STD. 152's when surveying items for different reasons.

3520.5 DONATION OF STATE PROPERTY

(Revised 9/04)

When an agency proposes to transfer state-owned personal surplus property to a non-state entity, the agency prepares a STD. 152 and submits it to the State and Federal Property Reuse Program Office for review and approval prior to final disposition. The recipient of the property must be on record with the State and Federal Property Reuse Program Office as an eligible donee, thus indicating the recipient is eligible to receive such property.

NOTE: For vehicles and mobile equipment, submit proposals to the Department of General Services, Office of Fleet Administration for review and approval.

3520.6 SALE TO ANOTHER STATE AGENCY

(Revised 9/03)

The same procedure is used as a transfer within an agency or department, except the selling agency must complete a Property Survey Report, STD. 152, and forward it to the Surplus Property Program Office before the sale takes place.

3520.7 PUBLIC SALE

(Revised 9/03)

An agency can offer state-owned personal surplus property for sale to the general public after the agency has offered the property for use within the agency and after submitting STD. 152 to the State and Federal Property Reuse Program Office for review and approval.

There are three methods an agency may use to dispose of state-owned personal surplus property through a public sale:

1. Sealed bid;
2. Auction;
3. Fixed price (not recommended).

3520.8 SEALED BIDS OR AUCTION SALES

(Revised 9/03)

Typically the sealed bid method of public sale brings the highest cash return to the State. The agency must make a diligent effort to secure at least three competitive bids. If the agency cannot make three competitive bids, the agency employee who solicited the bids must prepare and sign a list of the firms or individuals contacted. The agency must attach the bid solicitation list and the bids received to the STD. 152.

When an agency elects to dispose of state-owned surplus personal property through a public sale by auction, the agency must publish information about the auction to all sectors of the community. Public notices include:

1. Newspaper ads;
2. Posting of notice of sale in public places;
3. Mailings to interested businesses and individuals.

A fixed price sale requires the authorization of the Director of the Department of General Services.

Public sales should be announced a minimum of one week prior to the sale with newspaper ads running no less than three days. The bid opening date should allow ample time for advertising and inspection of the items by prospective bidders.

"Notice of Sale" flyers shall be made available on-site and should contain the following information:

1. When and where the items offered for sale may be inspected.
2. Bid opening date and time.
3. Method of notification to successful bidders.
4. Required method of payment and applicability of sales tax.
5. Required time frame for successful bidders to pick up items.
6. A "General Provisions" section should include an applicable statement similar to the following:

"Items are being sold as is and where is. Verification of the description and condition is the responsibility of the bidder. All sales are final. The State of California reserves the right to reject any or all bids, or to value any defects or irregularities therein. Minimum bid amounts, when indicated, shall be applicable."

"The State of California makes no warranty, either expressed or implied, as to the condition or completeness of the equipment being sold, nor does the equipment necessarily meet California Occupational Safety and Health Act Standard, Orders, or Regulations."

After the successful bidder has paid for his/her items and presented his/her receipt, he/she shall be requested to sign an appropriate delivery receipt to signify that he/she has received the material. When scrap and junk is being sold, the person taking delivery shall either sign a delivery receipt or give the agency a receipt indicating the type and approximate quantity of material removed from the premises.

After the sale of material is completed, the amount of cash received shall be recorded on the approved copy of the Property Survey Report, which is retained by the organizational unit.

Whenever public sales are conducted, a system of checks and balances shall be used. This shall, at a minimum, consist of having separate persons handle the sale and the collection of funds.

State employees may participate in public sales providing they do so in the same manner as the general public. Employees may not use their position, office or prestige to their advantage when participating in sales of materials, nor may they participate on state time.

3520.9 DISCARDED, SCRAPPED, OR DISMANTLED FOR SALVAGE

(Revised 9/03)

When an agency disposes of state-owned surplus personal property by means other than the sale of the property (i.e., salvaged, scrapped, discarded or hauled to landfill) the agency's responsible employee and unit supervisor shall certify in writing that the disposition has been accomplished. The certification may be made on the STD. 152, or attached and filed with the form. When the agency disposes of the property at a public landfill, the agency's representative obtains the signature of the disposal site operator or attendant, indicating that the property listed was disposed of at the site. If the landfill is unattended, the agency's responsible employee and the unit supervisor shall sign and certify that the disposition described was accomplished.

3521 DONATED FEDERAL SURPLUS PROPERTY

(Revised 9/03)

State agencies are eligible to receive donated federal surplus property distributed by the Department of General Services, Procurement Division, State and Federal Property Reuse Program Office. Substantial quantities of high-quality new and used surplus materials and equipment very frequently become available to State agencies from this source.

All agencies eligible to receive donated federal surplus property will make a maximum effort to acquire necessary materials and equipment through the Federal Surplus Property Program. The State and Federal Property Reuse Program Office assists agencies in securing federal surplus property through obtaining and circulating information as to available federal surplus property, and assisting agencies in placing requests for such items. Since desirable items are generally available for a very a limited time, agencies should promptly respond to notices of available property promptly.

3521.1 INSPECTION OF USED FEDERAL SURPLUS PROPERTY

(Revised 9/03)

The requesting agency inspects used federal surplus property before it is shipped to the agency. The Office of Fleet Administration; Department of General Services, inspects used vehicles.

3522 LOAN OF STATE SURPLUS PERSONAL PROPERTY

(Revised 9/03)

The State and Federal Property Reuse Program Office, Procurement Division, Department of General Services, maintains an inventory of office equipment such as computers, desks, chairs, tables, typewriters, and some office machines that are available to agencies on a short term, no-charge, loan basis.

Equipment may be obtained or reserved by contacting the State and Federal Property Reuse Program Office warehouses located at 1700 National Drive, Sacramento, CA 95834 and 701 Burning Tree Road, Fullerton, CA 92833.

All types of surplus property equipment may be loaned at no charge for periods up to 30 days.

In emergency situations, agencies requiring long-term use of equipment for which they are unable to fund rental charges may request exceptions to the 30-day loan limit by submitting supporting information to the Manager, State and Federal Property Reuse Program Office, Procurement Division. Also, if an agency delivers an approved purchase estimate to the State and Federal Property Program Office, surplus equipment may be loaned to the agency that originated the estimate pending receipt of the purchased equipment without regard to the 30-day limitation.

Agencies are expected to provide transportation for loaned or rented equipment. At the request of renting or borrowing agencies, equipment can be shipped by freight collect, or by common carrier.

3522.1 INTERDEPARTMENTAL EQUIPMENT RENTALS

(Revised 9/03)

It is intended that agencies exchange available equipment and related services on a rental basis. In order to provide a simplified and uniform procedure for these transactions, departments will use an Interagency Service Agreement and Invoice (STD. 13A) to request the rental of available equipment, order supportive services, and provide the necessary documentation for billing purposes. Rental rates must include charges to recover all direct and indirect costs. See SAM Sections 1212, 1212.2 and 8760, 8760.2.

Complete information on interagency rental of mobile equipment, repair facilities, and mobile equipment repair services is included in the following publications:

1. Statewide Mobile Equipment Inventory.
2. Repair Facilities Inventory and Location Catalog.

These publications are available from the Chairman of the State Equipment Council, care of the Office of Fleet Administration, Department of General Services, 802 Q Street, Sacramento, California 95814. The telephone number for the Office of Fleet Administration is (916) 327-2086 or ATSS 467-2086.

The Interagency Service Agreement and Invoice (STD. 13A) may also be used in the interchange of equipment and related supportive services with city, county, or other local government units within the State.

SALE OR EXCHANGE OF PRODUCTS (See Government Code Section 11330–35.)

Attachment B

Property Survey Board Membership

The members of the Property Survey Board shall serve a two-year term with reappointments allowed.

Members:

Emily Deakin – Chair

Raudel Banuelos – Finance and Administration FY2010

Lori Cordova – Contracts and Grants FY2010

Marti De La O – Advancement FY2010

Judy Frazier – Information Technology FY2010

Ed Lebioda – Student Affairs FY2010

Kris Muller – Academic Affairs FY 2010