

POLICY
of the
UNIVERSITY OF CALIFORNIA
governing
EQUIPMENT BUDGETING
for
NEW OR REMODELED BUILDINGS

June, 1964

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SCOPE OF THIS POLICY STATEMENT

This statement outlines policies with reference to acquisition, maintenance, and replacement of equipment for new or remodeled buildings and also includes statements concerning responsibility for maintenance and replacement of such equipment. Property accountability policies and procedures for University-owned and other non-University-owned equipment in use on campuses of the University of California, are described in the equipment inventory control manual issued by the Office of the Vice President-Business, July 15, 1960.

GENERAL POLICIES APPLICABLE TO EQUIPMENT

TITLE

The Board of Regents retains title to all University-owned property.

RESPONSIBILITY FOR EQUIPMENT

Responsibility for University-owned equipment, and other equipment for which the Board of Regents has assumed duties and obligations, rests with a University department for one of three reasons: (1) the department is using the equipment, (2) the department occupies a building in which the equipment is located, or (3) as part of its regular duties the department repairs or replaces equipment in the building. Departments responsible for equipment should make it available to other departments, especially where it is expensive and scarce, in order that the greatest utilization of University resources can be achieved.

REPLACEMENT, REPAIR, OR RENTAL OF EQUIPMENT

Funds required to replace, repair, or rent equipment are to be requested from Department Support Budgets and are not to be provided from the Capital Outlay Budget.

CLASSIFICATION OF EQUIPMENT

Equipment in this policy statement has been divided into two basic classifications: Fixed Equipment (built-in, group 1), and Movable Equipment (groups 2 and 3). Movable equipment is divided into the following sub-classifications: General Use Building Furniture and Furnishings, Generally Assignable Classroom Furniture, Generally Assignable Office Furniture, Specialized Equipment, and Expendable Equipment. These classifications shall be used in the preparation of the Capital Outlay and Support Budget requests to the State of California. This does not preclude use of a different classification system when required by the rules and definitions of non-State agencies, corporations, and foundations which provide funds for equipment acquisition or use.

FIXED EQUIPMENT

DEFINITION

Fixed equipment (Group 1) is defined as equipment which is built-in or permanently affixed to a building or structure. Examples are: fixed laboratory benches, fixed sterilizing equipment, fixed seating in auditoriums and lecture halls, and permanent television distribution equipment. Equipment units related to basic building operation are part of general building construction and are excluded from the definition of fixed equipment. Examples are: building hardware, building service units such as heating systems, exhaust and air conditioning systems, and elevators.

RESPONSIBILITY FOR EQUIPMENT

Responsibility for operation, maintenance, and repair of fixed equipment is delegated by the Chief Campus Officer to a University department, usually designated as "Buildings and Grounds", "Grounds and Buildings", or "Physical Plant".

ACQUISITION OF FIXED EQUIPMENT

Fixed equipment is normally funded as part of the capital outlay budget. Such equipment is acquired as part of the construction contract when existing buildings are altered, or when new buildings are constructed, and is capitalized as part of the cost of the building.

MOVABLE EQUIPMENT:
GENERAL USE BUILDING FURNITURE AND FURNISHINGS

DEFINITION

General use building furniture and furnishings include heavy-duty furniture required for lobbies, special corridors, and areas where the public tends to congregate. Also included in this category are furnishings for cot rooms.

ACQUISITION OF GENERAL USE BUILDING FURNITURE AND FURNISHINGS

Capital outlay funds may be requested to provide general use building furniture and furnishings in new or remodeled buildings.

RESPONSIBILITY FOR GENERAL USE BUILDING FURNITURE AND FURNISHINGS

In buildings which house several academic and administrative departments general use building furniture and furnishings will be maintained and replaced by the department responsible for building maintenance, generally Grounds and Buildings. In buildings which house single departments, or departments which are self-supporting, it may be the responsibility of the department which occupies the building to maintain and replace general use building furniture and furnishings.

MOVABLE EQUIPMENT:
GENERALLY ASSIGNABLE CLASSROOM FURNITURE

DEFINITION

Generally assignable classroom furniture is defined as movable equipment including but not limited to the following: lecturns, tablet arm chairs, and seminar tables.

RESPONSIBILITY FOR GENERALLY ASSIGNABLE CLASSROOM FURNITURE

Responsibility for maintenance, repair, and replacement of generally assignable classroom furniture is normally delegated by the Chief Campus Officer to a University department usually designated as "Buildings and Grounds", "Grounds and Buildings", or "Physical Plant".

ACQUISITION OF GENERALLY ASSIGNABLE CLASSROOM FURNITURE

New buildings will be equipped from capital outlay budget funds, with generally assignable classroom furniture as required for the classroom facilities programmed for the buildings. Additional units of generally assignable classroom furniture required after building occupancy shall be requested from the department designated by the Chief Campus Officer as responsible for generally assignable classroom furniture, generally "Buildings and Grounds".

MOVABLE EQUIPMENT:
GENERALLY ASSIGNABLE OFFICE FURNITURE

DEFINITION

Generally assignable office furniture is defined as movable equipment consisting of the following five items only: desks, chairs, tables, bookcases, and correspondence files.

RESPONSIBILITY FOR OFFICE FURNITURE

Generally assignable office furniture is the responsibility of the department occupying the building in which the furniture is located.

FURNITURE FOR NEW BUILDINGS

New buildings will be provided with new furniture from the Capital Outlay Budget, as required by the departments scheduled to occupy the building.

FURNITURE FOR EXISTING BUILDINGS

When a department is transferred from a building, the generally assignable furniture in the building will remain for use by the new occupants. Excess furniture will revert to the campus furniture pool. If, because of building alterations or remodeling, the remaining furniture is not suitable for the new occupants, the old furniture will be transferred to the campus furniture pool for redistribution on the campus. New furniture for such buildings will be funded with the alteration or remodeling project in the Capital Outlay Budget.

ADDITIONAL FURNITURE

Generally assignable office furniture required beyond the needs at building occupancy will be requested from the campus furniture pool. This applies to existing staff as well as to staff additions.

SPECIAL REQUESTS FOR FURNITURE

Non-University agencies to which University space has been assigned may request generally assignable office furniture from the campus furniture pool provided such agencies are willing to make suitable payment for furniture so assigned. Charges in such instances are subject to negotiation with the non-University agency, and will be determined by the Chief Campus Officer or his authorized representative.

MOVABLE EQUIPMENT:
SPECIALIZED EQUIPMENT

DEFINITION

Specialized equipment is defined as movable equipment with an expected useful life of a year or more. It has been grouped for University purposes into two categories: (1) office equipment, and (2) laboratory and other equipment. Classification of equipment into one of these categories is determined by the principal use of the equipment. For example, calculating machines, which are normally office equipment, could be classified as laboratory equipment if they are to be used in a statistical laboratory for students in the social sciences.

Examples of specialized equipment are:

<u>Office Equipment</u>	<u>Laboratory and Other Equipment</u>
adding machines	oscilloscopes
typewriters	chart recorders
comptometers	PH meters
photocopy units	colorimeters
spirit duplicators	electrophoresis units
mimeograph machines	centrifuges
files, tabulating card	spectrophotometers
files, special	metalworking machinery
calculating machines	woodworking machinery
dictating and transcribing machines	electronic testing equipment
	medical diagnostic and operating equipment
	mobile originating television equipment

RESPONSIBILITY FOR SPECIALIZED EQUIPMENT

Specialized equipment is the responsibility of the department using the equipment. Such equipment will be moved with a department when it is relocated.

ACQUISITION OF SPECIALIZED OFFICE EQUIPMENT

The need for specialized office equipment should be anticipated in department support budgets. Such equipment should not be included in requests for capital outlay funds unless specifically justified to support activities new to the department at the time new or remodeled buildings are occupied, or which represent substantial expansion or change in equipment required for teaching and research activities.

ACQUISITION OF LABORATORY AND OTHER SPECIALIZED EQUIPMENT

Laboratory and other specialized equipment will normally be requested through department support budgets. Capital outlay funds may be requested to support activities new to the department at the time new or remodeled buildings are occupied, or which represent substantial expansion or change in equipment required for teaching and research activities.

MOVABLE EQUIPMENT: EXPENDABLE EQUIPMENT

DEFINITION

Expendable equipment is defined as non-inventorial equipment, supplies, and materials. Examples include:

Office Supplies and Materials

Paper, pencils, pencil sharpeners, desk staplers, in-out baskets.

Laboratory Supplies and Materials

Glassware, laboratory metals, wire, filter paper, laboratory chemicals, medical supplies, dental supplies.

RESPONSIBILITY FOR EXPENDABLE EQUIPMENT

Expendable equipment is the responsibility of the department using the equipment. Such equipment will remain with the department using it when that department is moved to a new location.

ACQUISITION OF EXPENDABLE EQUIPMENT

The need for expendable equipment should be anticipated in department support budgets. Such equipment should not be included in requests for capital outlay funds unless required during the fiscal year of building occupancy for laboratories which are new to the department at the time the building is occupied, or which represent substantial expansion or change in equipment required for teaching and research activities.

APPENDIX I

Guidelines for Implementation of Equipment Policy for Requests from the Capital Outlay Budget

CAMPUS LEVEL

1. Chief Campus Officers are responsible for the preparation of equipment requests from the Capital Outlay Budget. Such requests will be prepared in accordance with University and campus policies and procedures.
2. The Chief Campus Officer is responsible for the review of equipment requested from the Capital Outlay and Support Budgets. He should appoint such faculty and administrative review committees and establish such other review procedures as he deems necessary to minimize the cost of equipment (consistent with campus academic, research, and administrative needs), and to see that there is no duplication of equipment requests in the Capital Outlay and Support Budgets.

UNIVERSITY-WIDE LEVEL

1. Supporting documents for equipment requests are reviewed at the University-wide level to insure that these documents adequately justify the funds requested from the State before the Capital Outlay Budget is submitted to The Regents and to the State of California.
2. An equipment list (excluding fixed equipment) shall be submitted for each Major Capital Improvement Project, as provided in Section 6621 of the State Administrative Manual. The content and format of the equipment list will be determined by the University-wide administration in consultation with the campuses.
3. Statements of justification must be provided (1) for expensive equipment, and (2) for special and quantity requests included in the equipment list. Definitions of the above types of justification will be determined by the University-wide administration in consultation with the campuses.
4. The Vice President-Business will have authority and responsibility for conducting whatever post-audit procedures are necessary to insure compliance with equipment policy.