

INSTRUCTION NUMBER: WIOA 13-13 Amendment 2

SUBJECT: WIOA Property Control

DATE ISSUED: <u>October 2, 2017</u>	DATE EFFECTIVE: <u>Immediately</u>	DATE EXPIRES: <u>Indefinitely</u>
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PURPOSE:

- To outline how to properly maintain a current and detailed property control system
- To outline how to properly add new items to the property control system
- To outline how to properly dispose of damaged property control items
- To outline how to properly transfer property control items from one location to another
- To outline property control monitoring expectations

BACKGROUND: This policy conveys guidelines governing property management of items purchased with Workforce Innovation and Opportunity Act (WIOA) funds. This policy is an internal policy as Spartanburg County Government does not have a property control policy.

ACTION:

I. Maintaining a proper list:

- Each program receiving Upstate WIOA funds should designate a staff member(s) to maintain property control records.
- Each program should maintain a detailed list of items that includes the following: description of item, date purchased, vendor, model, location, serial number, condition, cost, grantor funds used, who holds the title and disposition information to include disposal date, date of sale and sale price, if applicable. Office supplies should not be included. Only items costing \$100 or more with a useful life of more than one year should be listed.

II. Adding new property control items to property control records:

- The staff person responsible for ordering the new item should complete the New Inventory Sheet (see attached) and submit it to the property control staff person at their respective location within 2 business days of placing the order.
- New items should be added to the property control system within 2 business days of delivery of the new item.
- Property control staff should request a printed label from the Upstate Workforce Board (UWB) Chief Financial Officer (CFO). The request should be made by email (bishop@upstaterworkforceboard.org).

- The label should be printed and delivered to the site or made available for pick up within 2 business days of the email request.
- New Inventory Sheet copies should be maintained for monitoring purposes.

III. Disposal of damaged items:

- Items damaged beyond repair should be disposed of by Spartanburg County.
- Items in need of disposal should be recorded on a Disposal Inventory Sheet (see attached) and submitted to the UWB CFO.
- The UWB CFO will contact Spartanburg County to arrange pick up of the damaged item(s).
- Once the item(s) has been removed from the location, a copy of the Disposal Inventory Sheet documenting the removal date should be submitted to the UWB CFO for removal from the property control system.
- Disposal Inventory Sheet copies documenting the removal date should be maintained for monitoring purposes.

IV. Transferring items between locations/programs:

- Items may be transferred from office locations.
- Office locations are defined as: SC Works Cherokee, SC Works Spartanburg, SC Works Union, USC Upstate, ACHIEVE, YouthStop and UWB.
- Office location transfers should be approved by the UWB CFO.
- Once approved, the item(s) may be moved to the new location.
- A copy of the Transfer Inventory Sheet (see attached) detailing the date the item(s) was removed should be submitted to the UWB CFO for an official transfer within the property control system.
- A copy of the Transfer Inventory Sheet detailing the date and location of the transfer should be maintained for monitoring purposes.
- The Transfer Inventory Sheet should also be used when items are transferred within the same office. i.e. moving a desk from one room to another in the same location.

V. Guideline of recommended locations for fixed asset identification labels:

- **Computers:**
 - Laptop equipment should be tagged with a fixed asset label on the bottom of each laptop.
 - Desktop units should be tagged with a fixed asset label on the front of the PCU near the disc drive. It is not necessary to tag each monitor, keyboard and mouse associated with each PCU. For the purpose of this inventory, the PCU represents a complete desktop computer. If extra monitors, etc. are on hand and do not make a complete set, each item should be tagged individually.
 - Other peripheral equipment should be tagged with a fixed asset label on the right side near the back.
- **Office Equipment** such as fax machines and photocopiers should be tagged with a fixed asset label on the right side near the back.

- **Furniture:**
 - Bookcases, storage cabinets and file cabinets should have fixed asset labels on the upper right hand corner.
 - Chairs (with legs) should be tagged with a fixed asset label on the front right exposed leg.
 - Chairs (on wheels) should be tagged with a fixed asset label on the bottom of the chair.
 - Desks and credenzas should be tagged with a fixed asset label on the right support, toward the top inside area under the foot well. If there is no foot well, the top outside right will be acceptable.
 - Tables and workbenches should be tagged with a fixed asset label at the top of a front right side leg or base.

- **Audiovisual Equipment** should be tagged with a fixed asset label on the right side near the back of the item.

- **Appliances** such as kitchen equipment should be tagged with a fixed asset label on the top right corner on either the front or side depending on what will provide the best visibility.

VI. Certification of Accuracy:

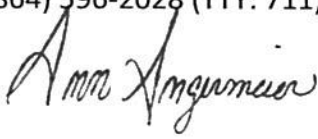
- The property control system should be current at all times. Lists may be requested at any time by UWB staff for monitoring purposes.
- Programs/Contractors should verify their physical inventory in its entirety once a year. A complete property control report should be submitted by each location to the UWB office prior to December 31st annually.
- The UWB CFO will conduct a full property control review of the UWB office annually. The review will be documented in a central file labeled Property Control/Inventory. This report will be reviewed and signed by the Associate Director or the Executive Director.
- UWB internal monitors will review WIOA program property control logs and spot check items as a component of monitoring. The results/findings will be documented in monitoring reports issued by the UWB office.

VII. Miscellaneous

- All property purchased with WIOA funds is considered WIOA property belonging to the UWB. The items on the property control log are not considered *permanent* property of any UWB contractors.
- Any loss, damage or theft should be reported and investigated.
- Proper maintenance should be completed on items in which maintenance is required or necessary.
- When acquiring replacement equipment, you may use the equipment to be replaced as a trade-in or sell the property and use the proceeds to offset the cost of the replacement property, subject to the approval of the UWB office.

- If authorized or required to sell any property, proper sales procedures must be established to ensure the highest possible return. This policy will be set should the need arise. It will be issued as an amendment to this instruction letter.

INQUIRIES: Should you have any questions concerning this instruction letter, please contact Brent Bishop at (864) 596-2028 (TTY: 711) or bishop@upstateworkforceboard.org.



Ann Angermeier
Executive Director
Upstate Workforce Board

Comment: Replaces Local Instruction letter 13-13 Amendment 1