



LBLN Property Management Procedure

Borrowing Personal Property for Testing

Owner

Policy - Property Management – Property Manager
Procedure - Property Management – Property Manager
Process – Divisions – Requester/Custodian

Overview of the Process

It is common practice for Laboratory staff to borrow equipment for the purposes of testing its suitability for future acquisition. A Borrow for Testing is distinct from the DOE-defined Personal Property Borrow for Use, which is an organizational agreement involving Property Management. Borrows for Testing are generally for a short period of time, are authorized, approved and managed totally within the division and do not require the approval by or notification to, Property Management. Safety is a prime consideration for all borrowed equipment, including that borrowed for testing. Review and clearance by the division's safety coordinator is required before any item of borrowed property is placed into use. The Laboratory's limited liability for borrowed property must be acknowledged in writing by the loaning entity prior to its being shipped.

Regulations:

- Department of Energy Order 580.1, CRD, Section 2. b., Borrowing Personal Property
- LBNL Personal Property Policy Manual, Section 16.2.
 - <http://www.lbl.gov/Workplace/CFO/assets/docs/pro/prty/PropertyManual.pdf>

Definitions:

- Borrow for Testing: to obtain personal property for the purpose of determining whether it performs as anticipated or advertised or whether it could fulfill a need. Borrow for Testing assumes no obligation whatsoever to the lender except the return of the property at the close of the borrow period.
- Requester: the custodian of record or individual acting on behalf of the custodian.
- Limited Liability: the circumstances under which the Laboratory will accept financial recourse by the lender for damage to borrowed property as spelled out in the Borrow Agreement.

Roles:

- Property Management-develops the internal policy, procedures and any forms appropriate to this non-DOE sanctioned borrow
- Divisions approve Borrows for Testing
- Custodian/Requester-initiates the process by completing the Borrow for Testing form
- Property Representative-provides support to the Custodian/Requestor

Responsibilities:

Property Representative:

- Provides support to the requestor in preparing the Borrow for Testing form
- Retains a copy of the completed form for documentation
- Tags borrowed property with Property of Others identifying stickers
- Removes Property of Others stickers upon return of property

Custodian/Requester:

- Fills out the Borrow for Testing Agreement
- Obtains division approval for the borrow
- Assures borrowed property reviewed for safety prior to use
- Provides copy of completed form to Property Representative



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Division:

- Identifies approving official for borrows
- Manages, tracks and controls the borrowed property until returned to lender
- Returns borrowed property timely

Procedures:

Borrowing Property for Testing:

- Requester completes the Borrow for Testing form
- Requester obtains Division Approval, Division Safety Coordinator and Lender's signatures on form before using property
- Requester provides a copy of the completed Borrow for Testing form to his Property Representative
- When the property is delivered, the Property Representative tags it with Property of Others barcode sticker
- All borrowed property must be reviewed by the division safety coordinator prior to being placed into use. The safety coordinator must sign off on the Borrow for Testing form. Such signature indicates that the property is safe for use.
- When borrowed property is returned to the lender the Requester checks the Property Returned Box on a copy of the original Borrow for Testing and sends it to the Division Property Representative.

Forms:

Borrow for Testing Agreement

- Property Management website: http://www.lbl.gov/Workplace/CFO/pro/property/prty_forms.html

Reports:

None