Title: Tool Management Policy

Background & Purposes:

1. Definition:
   1.1. Tools and Equipment: Non-fixed assets that are purchased and used for the service and maintenance of fixed or non-fixed assets.

2. Purpose:
   2.1. To ensure UBC Facilities’ tools and equipment are managed in a safe and cost-effective manner.

3. Policy
   3.1. All tools and equipment are to be managed through the Stores business unit (Stores) within Building Operations. User shops may rent any available tool from Stores on either a short-term or a long-term basis, or may purchase tools outright for exclusive use.
   3.2. Stores will be responsible for the permanent tagging and identification of all purchased tools and equipment. Store will be responsible for creating and maintaining relevant data record sets of all tools and equipment including tracking, issuance, maintenance and disposal of all tools and/or equipment.
   3.3. All purchased tools and equipment are the property of the University. They are only to be used by trained University personnel in the course of their work for the University. Tools will not be lent out to University employees, contractors or other individuals for personal use.
   3.4. Tools valued in excess of $1,000 CAD each are to be tracked as assets, whereas tools less than $1,000 CAD are to be treated as consumables. Each tool will be engraved with “Property of UBC” by Stores personnel.
   3.5. All Building Operations’ tools and equipment shall be requested via Stores and require an authorized requisition. A Vehicle and Equipment Justification Form (Appendix 2) must be completed and approved for any individual tool or equipment purchase in excess of $1,000 CAD.
   3.6. Employees shall not be held liable for any loss, injury or damage relating to a tool that has been issued to them where the circumstances resulting in the loss, injury or damage were beyond their control.
   3.7. Employees must return tools to Stores prior to leaving the University. Employees may be held financially responsible for any tool that is not returned.
4. Guidelines:
4.1. Stores is governed by and must work within the guidelines set forth in various Federal and Provincial statues and regulations, as well as relevant UBC policies and procedures. These include:
   a) B.C. Workers Compensation Act
   b) B.C. Workers Compensation (Occupational Health & Safety) Amendment Act
   c) B.C. Occupational Health & Safety Regulation
   d) UBC Policy #122 – Purchasing

5. Procedures:

   Acquisition of Tools & Equipment
   5.1. Requisition to be created by business unit Head or Manager and contain all relevant information and specifications relating to the tools including: description, type, make, model number, vendor and catalogue number.
   5.2. Requisition must include all relevant regulatory testing/calibration requirements and any scheduled maintenance requirements.
   5.3. Stores shall review requisition and validate tool descriptions to conform to conventional naming standards (Noun, Modifier, Attribute, Size, Dimension, etc.).
   5.4. Stores shall assign one of the following Categories to each tool:
      a) Common: Generic use, purchased from primary supplier, subject to standardization, approved by head; i.e., POWER TOOL, DRILLS, CORDLESS
      b) Specific: Unique use, purchased for specific task/shop, subject to required specifications, purchased from primary or specific supplier, approved by manager; i.e., GAS POWERED LINE TRIMMER.
      c) Regulatory: Requires re-occurring testing or calibration event for certification of use, purchased for common or unique task/shop, subject to required specifications, purchased from primary or specific supplier, approved by manager; i.e., SAFETY AIR MONITOR
      d) Value Threshold: Tools or equipment that exceed a pre-defined value (i.e. $1,000.00CAD), purchased from primary or specific supplier, approved by manager; i.e., GENERATOR, EMERGENCY, 350KW
      e) Rental: Any Tools or piece of equipment available for rental pool, any category, approved by Head.

   5.5. The approved requisition will be received and actioned by the Buyer. The Buyer will work with the Stores to ensure there are no duplications or that inventory does not exist.

6. Tracking of Tools:
6.1. Upon receipt of all tools and equipment, Serial Number tracking and UBC branding will be performed by Stores.
6.2. All tools will be assigned a Status of either Tracked or Non-Tracking based the following criteria:

<table>
<thead>
<tr>
<th>Tracked:</th>
<th>Non-Tracking</th>
</tr>
</thead>
<tbody>
<tr>
<td>Any Tool for Rental Pool</td>
<td>Less than $1,000.00CAD in value</td>
</tr>
<tr>
<td>Exceeds $1,000CAD in value</td>
<td>Does not require regulatory maintenance event</td>
</tr>
<tr>
<td>Requires regulatory maintenance event</td>
<td>Does not require scheduled maintenance event</td>
</tr>
<tr>
<td>Requires scheduled maintenance event</td>
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</tbody>
</table>
6.3. Tools not requiring tracking in the system will be issued to the employee requiring the tool or equipment. The employee will need to sign for the tool or equipment upon pick-up.

6.4. Stores will follow the necessary steps to ensure that the asset is entered into the asset management software.

7. **Issue of Tools for rental purposes:**
   7.1. Tools will be issued on a rental basis to UBC employees who provide a valid work order and their valid employee number to Stores.
   7.2. The employee shall take all reasonable steps to care for the tool while it is in their possession.

8. **Return of Rental Tools:**
   8.1. All tools must be returned to Stores on expected return date.
   8.2. On return of the tool, the employee must notify Stores of any deterioration in the condition of the tool.
   8.3. Stores will inspect the tool and complete the required inspection questionnaire.

9. **Maintenance of Tools**
   9.1. Stores will schedule all required regulatory calibration/testing events and scheduled maintenance events.
   9.2. Stores shall quarantine and not make available any tool that has exceed its calibration/testing date
   9.3. Stores shall initiate any maintenance or repairs required.
   9.4. A record is to be kept of all maintenance carried out on fixed shop equipment, lifting equipment (e.g., Hiab, Genie) and safety equipment (e.g., gas monitors, HEPA vacuums).
   9.5. Where the tool is damaged beyond repair and cannot be used again Stores will follow the Disposal of Tools and Equipment procedure.

10. **Lost Tools:**
   10.1 For all tracked tools, Stores must be notified immediately if a tool disappears and the details of how it was lost.
   10.2 Where the tool is lost; Stores will follow the Disposal of Tools and Equipment procedure.

11. **Charge out of Rental Tools:**
   11.1 All tools and equipment are to be issued against a specific work order number and charged out at the applicable hourly, daily, weekly or monthly rate.
   11.2 Tool charge out rates shall be set each year by Stores and approved by the Senior Manager, Fleet and Procurement and the Director of Municipal Services.
   11.3 Charge out rates will be based on usage and replacement cost of each tool. Stores will be responsible for maintaining and updating the charge out rates.

12. **Third Party Rentals:**
   12.1. Tools that are not available by Stores because the tool is not serviced and does not warrant purchasing will be rented by Stores from a preferred UBC vendor with a specified time period.

13. **Physical Inventory:**
   13.1. Stores shall perform an annual inventory count of each tracked tool which will include an inspection and condition assessment with actions to be taken based on the usability and condition of the tool.
14. Disposal of Tools & Equipment
   14.1 The disposal of tools and equipment will be coordinated through Stores.
   14.2 Stores will ensure that records are maintained for the disposal of all tools and equipment
       controlled through Stores. The Tool and Equipment Disposal Form (Appendix 3) will be used for
       that purpose, as well as to record lost tools.
   14.3 Stores will ensure that the inventory record in the system has a status of “Abandoned” for
       disposed or lost tools.
   14.4 Surplus tools and equipment will be sold according to University Policy #108 – Disposal of Surplus
       Equipment and Materials.
   14.5 Obsolete or damaged tools and equipment that cannot be sold will be recycled or discarded with
       written authorization from the Senior Manager, Fleet & Procurement Services
TOOL and EQUIPMENT REQUISITION FORM (not necessary if submitting requisition in Planon – only to be used if submitting to Stores)

REQUISITION DATE: ________________________________
REQUESTORS NAME: ________________  REQUESTORS EMPLOYEE #: ________________
WORK ORDER: ________________________________  HEAD or MANAGER: ________________

DESCRIPTION OF TOOL REQUIRED:

TYPE (i.e. Hammer Drill): ________________________________
SIZE/CAPACITY: ________________________________
MANUFACTURER NAME: ________________________________
MODEL #: ________________________________
ESTIMATED PURCHASE PRICE: __________________
QUANTITY REQUIRED: __________________
DATE REQUIRED: __________________

FULL DESCRIPTION OF TOOL (to describe to vendor if model # unavailable): __________________
______________________________
______________________________
______________________________

NEW TOOL ________  REPLACEMENT FOR DAMAGED/LOST TOOL ________

TOOL USE (Check one):
PERMANENT ISSUE TO SHOP ______  (RENTAL) SIGN OUT POOL ______

TOOL FINANCING (Check one):
PURCHASE BY SHOP ______  PURCHASE BY STORES (AND RENT) ______

SHOP HEAD: ________________________________

SIGNATURE OF SHOP HEAD: ________________________________
VEHICLE & EQUIPMENT JUSTIFICATION FORM

This form must be completed before purchasing or leasing any vehicle, tool or capital equipment with an estimated asset value greater than $2,500. Please provide the required information, obtain the necessary sign-offs and submit to Director for approval. The completed form must be attached to the Purchase Requisition.

Requestors Name ____________________________________ Division __________________________

Type of Vehicle, Tool, or Equipment Required

___________________________________________________________________________________

Description/Specifications (Make, Model, Job Function, Hauling Weight Requirement, Passenger Requirements, Specialty Features i.e. power tailgate)

___________________________________________________________________________________

___________________________________________________________________________________

___________________________________________________________________________________

Quantity Required _______  Date Required _____________________

Describe why the vehicle, tool, equipment is required:
Replacement - If so, what is being replaced and why? _________________________________________
Project Requirement - If so, what project and for how long? _____________________________________
New Requirement - If so, what is the requirement? ___________________________________________
Conversion from Rental - If so, what is the use and for how long? _______________________________
Other _______________________________________________________________________________

What is the consequence of NOT acquiring the equipment? ___________________________________

____________________________________________________________________________________

Do we have personnel trained to operate the vehicle, tool, and equipment? Y N Who?

________________________________________

Is adequate parking/storage available for the vehicle, tool, and equipment? Y N Where?

________________________________________

Which Head and Manager will be responsible for the vehicle, tool, and equipment on a daily basis?

________

Will the vehicle, tool, equipment be managed by the Stores? Y N

Funding for the vehicle, tool, equipment (attach budget sheet showing cost and supporting revenues)

_______________________________________________________________________________
VEHICLE & EQUIPMENT JUSTIFICATION FORM Continued

Expected Percentage of Regular Time Used for Core Funded Work _____________________
Expected Percentage of Regular Time Used for Cost Recoverable Work __________________
Expected Percentage of Regular Time that Vehicle/Tool/Equipment will be idle _____________

100%

How will this vehicle or equipment improve work productivity and/or safety? _______________________

Vehicle, tool, equipment to be: Purchased Leased (circle one)

Est. Purchase Price __________ Est. Lease Rate/Month ___________ Lease Term ___________

SIGN-OFF

User/Operator ____________________________ Date ____________
Requestor’s Manager ____________________________ Date ____________
Stores Manager ____________________________ Date ____________

APPROVAL

Requestor’s Director ____________________________ Date ____________
APPENDIX 3

TOOL & EQUIPMENT DISPOSAL FORM

This form is to be used to record lost tools or tools that need to be sold or discarded.

DATE: ________________________________

SHOP: ________________________________

MANAGER’S NAME: ________________________________

MANAGER’S SIGNATURE: ________________________________

TOOL TYPE: ________________________________

TOOL NUMBER: ________________________________

SERIAL #: ________________________________

TOOL MANUFACTURER: ________________________________

MODEL #: ________________________________

SIZE (if applicable): ________________________________

REASON FOR TOOL DISPOSAL (OR LOSS): ________________________________

_____________________________________________________________________________________
_____________________________________________________________________________________
_____________________________________________________________________________________
_____________________________________________________________________________________