
 THE UNIVERSITY OF BRITISH COLUMBIA Facilities	Policy No.: I-C-03	Approval Date: Last Revision:
	Responsible Executive:  John Metras Associate Vice-President, Facilities	
Title: <p style="text-align: center;">Tool Management Policy</p>		
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
 - e) UBC Policy #108 – Disposal of Surplus Equipment and Materials.

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-Tracked based the following criteria:

Tracked:	Non-Tracked
Any Tool for Rental Pool	Less than \$1,000.00CAD in value
Exceeds \$1,000CAD in value	Does not require regulatory maintenance event
Requires regulatory maintenance event	Does not require scheduled maintenance event
Requires scheduled maintenance event	

- 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 exceeded 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 _____



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): _____

