

<b>Subject:</b>  <b>Loan of Government Equipment/ Material from PPPL To Domestic Organizations</b>	<b>Effective Date:</b>  <b>Oct. 11, 2006</b>	<b>Initiated by:</b>  Materiel & Environmental Services Division Head
	<b>Supersedes:</b> MC-003 Rev 2, dated 5/31/02	<b>Approved:</b>  Director

**Applicability**

This procedure is applicable to all Laboratory personnel and subcontractors loaning government equipment/material to other DOE offices/contractors, federal agencies, and other domestic organizations for official purposes.

**Introduction**

Government equipment/material that is not in current use and can be released may be loaned for official purposes to other DOE offices/contractors, federal agencies, and other organizations having a valid DOE or other applicable Federal contract or grant number. Such loans shall be covered by written agreements which shall include all terms and conditions that may be required to ensure control and protect PPPL's and DOE's interests. DOE Order 580.1 provides for a loan period of up to three years, but not to exceed the duration of the applicable DOE contract or grant.

**Reference Documents**

DOE Order 580.1 – Department of Energy Personal Property Management Program  
 Procedure MC-004, Acquisition and Disposal of Excess Government Property  
 GEN-005, Modifying the PPPL Master Equipment List

**Definitions**

**Lender** - PPPL personnel responsible for government equipment/material being loaned.

**Borrower** - DOE office, contractor, federal agency or other organizations that are able to provide a valid DOE contract or grant number.

**Loan Agreement Coordinator** - PPPL person responsible for documenting and controlling loan agreements.

**Procedure**

**Responsibility**

**Action**

- |                             |  |
|-----------------------------|--|
| Lender                      | <ol style="list-style-type: none"> <li>1. E-mails completed Request to Loan Property Form (Attachment 2), located on the Materiel Services website (<a href="http://oorm-1-priv.pppl.gov/users/mat/">http://oorm-1-priv.pppl.gov/users/mat/</a>), to PPPL Loan Agreement Coordinator.</li> <li>2. Obtains approval of Master Equipment List Modification Form per GEN-005 and sends copy to Loan Agreement Coordinator.</li> </ol> |
| Loan Agreement Coordinator  | <ol style="list-style-type: none"> <li>3. Obtains concurrence from the Lender’s Department Head, Division Head and Project Planning &amp; Control Officer/Project Administrator for the loan request.</li> <li>4. Initiates a review by Providing Property Coordinator with Request to Loan Property Form and listing of applicable assets for review against PPPL asset management database.</li> </ol>                           |
| Property Coordinator        | <ol style="list-style-type: none"> <li>5. Verifies that property numbers are on the equipment and match the numbers provided on the Request to Loan Property Form.</li> <li>6. Provides Loan Agreement Coordinator with property numbers, acquisition costs, changes or corrections, if applicable, on Request to Loan Property Form.</li> </ol>   |
| Loan Agreement Coordinator  | <ol style="list-style-type: none"> <li>7. Initiates a review by providing Excess Property Coordinator with Request to Loan Property Form and applicable assets against PPPL Summary Listing of Proliferation Sensitive Property per Materiel Control Division Policies and Procedures Manual, 1001.9.</li> </ol>   |
| Excess Property Coordinator | <ol style="list-style-type: none"> <li>8. Provides Loan Agreement Coordinator with copy of Proliferation Sensitive Property Review Form(s) and provides Property Coordinator with original copy, if applicable.</li> </ol>   |
| Borrower                    | <ol style="list-style-type: none"> <li>9. Provides valid contract, grant number, or science education agreement, location, and purpose of loan.</li> </ol>   |
| Loan Agreement Coordinator  | <ol style="list-style-type: none"> <li>10. Verifies contract, grant, or agreement and duration on Personal Property Loan Agreement. Issues the computer-generated Personal Property Loan Agreement. (Attachment 1) and sends to Borrower/property contact for review and approval.</li> </ol>  |
| Borrower                    | <ol style="list-style-type: none"> <li>11. Signs and returns the Personal Property Loan Agreement. to the PPPL Loan Agreement Coordinator.</li> </ol>  |

## Loan Agreement

Coordinator

12. Obtains Materiel & Environmental Services Division Head approval.
13. Obtains approval from appropriate local DOE official (Contract Specialist or Contracting Officer) when required.
14. Distributes approved copies to Borrower/property contact, Property Coordinator, Accounting & Financial Controls Division (if applicable), Shipping, ES&H (if applicable), Lender, Project Planning & Control Officer/Project Administrator, and DOE/PSO.

Lender

15. Contacts Shipping Office. **Shipping order must accompany item(s) whether hand carried or shipped from PPPL.**

Shipper

16. Reviews and confirms property tag information, where applicable, against Personal Property Loan Agreement Form.
17. Issues shipping order and ships item(s) "collect."
18. Places copies of Personal Property Loan Agreement and shipping order in suspense file awaiting return of property or renewed loan agreement.
19. Distributes copies of shipping order to Lender, Loan Agreement Coordinator, Property Coordinator, and Accounting & Financial Controls Division (if applicable).

Property Coordinator

20. Enters Loan Agreement information in Asset Management database.

Loan Agreement

Coordinator

21. Prior to loan expiration, e-mails Lender, Department Head, Division Head, Project Planning & Control Officer/Project Administrator for approval to either renew, transfer, or have items returned.
22. Forwards revised Personal Property Loan Agreement Form to Borrower/property contact for review/signature and return.
23. Verifies loan and contract/grant/agreement information is current and complete.
24. Obtains Materiel & Environmental Services Division Head approval.
25. Obtains approval from the appropriate DOE official (Contracting Officer, Contract Specialist or DOE Organizational Property Management Officer) as appropriate.

26. Forwards transfer and excess requests to Excess Property Coordinator (if applicable).
27. Ensures compliance with the terms listed on the Personal Property Loan Agreement Form for loaned items being returned to PPPL.
28. Provides notification and copies of loan agreement to Receiving, Property Coordinator, and Accounting & Financial Controls Division (if applicable) for all inbound items. Revises or closes loan agreement as appropriate.
29. Posts active Loan Register on the PPPL Home Page and Materiel Services Website quarterly. Notifies Department Heads, Division Heads, and Project Planning & Control Officer/Project Administrator by e-mail when new Loan Register has been posted.
30. Issues active Loan Register to Materiel & Environmental Services Division Head upon request.
- Receiving & Shipping Leader 31. Notifies PPPL Lender by phone and/or e-mail upon receipt of equipment or material.

**NOTE**

**For items hand carried back to PPPL, the Lender must notify the Receiving & Shipping Leader and the Loan Agreement Coordinator by e-mail or hard copy notification that the property has been returned.**

32. Requests disposition instructions and distributes receiving report to: PPPL Loan Agreement Coordinator, Accounting & Financial Controls Division (if applicable), Lender, Property Coordinator, file, with suspended copy of loan agreement.
- Property Coordinator 33. Updates loan information in Asset Management database system.

**Attachments**

- 1 - Personal Property Loan Agreement Form
- 2 - Request to Loan Property Form

DOE F 4420.2OMB Control No.  
(10-92)  
All Other Editions Are Obsolete

1910-1000

**U.S. Department of Energy  
Personal Property Loan Agreement  
OMB Burden Disclosure Statement**

Public reporting burden for this collection of information is estimated to average 30 minutes per response, including the time for reviewing instructions, searching existing data sources, gathering and maintaining the data needed, and completing and reviewing the collection of information. Send comments regarding this burden estimate or any other aspect of this collection of information, including suggestions for reducing this burden, to Office of Information Resources Management, AD-241.2 - GTN, Paperwork Reduction Project (1910-1000), U.S. Department of Energy, 1000 Independence Avenue, S.W., Washington, DC 20585; and to the Office of Management and Budget (OMB), Paperwork Reduction Project (1910-1000), Washington, DC 20503.

DOE-PMR 109-1.5104		1. CONTROL NUMBER		2. LOAN DATE		3. EXPIRATION DATE		4. PAGE 1 OF 1	
5. NAME ADDRESS TELEPHONE NO. (LENDER)					6. NAME ADDRESS TELEPHONE NO. (BORROWER) FAX:				
7. PURPOSE OF LOAN AND LOCATION WHERE PROPERTY WILL BE USED									
8. REFERENCE/CONTRACTUAL DOCUMENTATION/SHIPPING INFORMATION Please contact Joyce Bitzer six weeks prior to returning items.									
9. ITEM NO.	QUANTITY	PROPERTY NO.	SERIAL NO.	PERSONAL PROPERTY DESCRIPTION				ACQUISITION COST	
(If additional Space is necessary, attach a separate sheet)									

**TERMS AND CONDITIONS OF LOAN**

1. The borrower shall:
  - a. return the loan item(s) in like condition as received from Lender, normal wear and tear excepted, and free of contamination, on or before the expiration date, unless the loan period is formally extended or the loan is terminated before the due date;
  - b. in case of loss or damage of the property loaned, reimburse the Lender at the current price of replacement or repair;
  - c. assume all costs involved in preparation, handling, loading, disconnecting, and transportation from and to the Lender;
  - d. agree to indemnify and hold harmless the Lender and the Department of Energy against any and all liability, loss, damages, claims and costs incidental hereto as a result of Borrower's use or possession of the loaned property; and
  - e. use the loan property only for the purposes specified in this loan agreement.
2. The above property shall not be modified, loaned, or transferred to a third party without the written permission of the Lender.
3. The Borrower shall account for, or permit inspection of, the loaned property by the Lender after proper notification.
4. This is United States Government Property. Title to the property is vested in and will remain with the United States and the property shall be used only for official purposes. The Lender reserves the right to cancel the loan or to recall the loaned property upon 10 days notice.

Accepted By: \_\_\_\_\_  
Borrowing Agency/Organization Approval Title Date

Approved By: \_\_\_\_\_  
Signature of Authorized Lender Title Date

Approved By: \_\_\_\_\_  
Department of Energy Official Title Date

**REQUEST TO LOAN PROPERTY**

(Use for new Loans to other Labs, Universities, etc. or for new Collaborations being performed by PPPL personnel at other locations)

**To:** Sara Flohr MS-04 or sflohr@pppl.gov

**Date:**

**From:**

**Subject: Loan of Property to:**

\_\_\_\_\_ ( Full Name of Organization, etc.)

Request a ( ) Loan Agreement or ( ) PPPL Collaboration property shipment be initiated for the following items: (Insert additional "Table" rows below or attach Excel spreadsheet if necessary). Please indicate if item is Fabricated Equipment by writing 'F' for fabricated in the first column below.

<b>F?</b>	<b>Tag No./Serial No.</b>	<b>Description</b>	<b>Qty</b>	<b>Est. Cost</b>

**ALL ENTRIES SHOULD BE COMPLETED** (Call Sara at x2882 if assistance is needed)

<p>• Borrower's name/telephone number (Fax and email if available):</p>
<p>• Name/telephone number (Fax and email if available) of Individual at Borrowers location that is authorized to sign Loan Agreement for Borrower's Organization:</p>
<p>• Borrower's contract number, treaty and/or international agreement name and Expiration Date:</p>
<p>• Name of Off-Site Project being supported:</p>
<p>• Purpose and benefits of loan:</p>
<p>• Length of loan (up to 3 years):</p>
<p>• Ship To address:</p>
<p>• Location of property at PPPL:    <b>Building:</b>    <b>Room:</b></p>

