

## **EDUCATION, TRAINING AND TECHNICAL ASSISTANCE**

### **Equipment Purchasing, Inventory and Disposal**

#### **Purchasing:**

##### **A. Regular Bureau Purchases:**

Includes office supplies and equipment. Excludes items purchased by the Directors Office or Information Technology (IT).

1. The Education, Training and Technical Assistance (ETTA) employee gets quote for item(s) needed, using the instructions found in the Purchasing Procedures – PowerPoint Presentation.
2. If the request for purchase is approved by supervisor and bureau chief, the administrative assistant is notified of the request and provided a copy of the quote.
3. Administrative assistant provides ETTA purchasing representative (sales manager) with a copy of the approved quote and budget code.
4. Sales manager submits the order with directions for the item(s) to be delivered to the sales manager.
5. Once delivered, order is confirmed as correct by the sales manager, the supervisor, bureau chief, or the employee that ordered the item(s).
6. The sales manager notifies the applicable supervisor, who then delivers the item to the appropriate employee. This ensures that items are added to the appropriate inventory (bureau or employee), where applicable.
7. The employee emails the sales manager with any changes to the personal inventory, as a result of the purchase, if the item is typically tracked on inventories and isn't standard office supplies. (See Inventory paragraph below for more information.) The employee will copy the supervisor on the email. If the item being purchased replaces another item that will be discarded, the employee will follow the procedures for surplussing bureau equipment.
8. The sales manager, or other person responsible for managing the bureau and employee inventory, will ensure that the item is placed on the appropriate inventory where applicable.

##### **B. Purchases by the Director's Office:**

In some instances, the Director's Office may make purchases for the bureau.

1. For purchases initiated by ETTA that will be purchased by the Director's Office (for example iPads, large supplemental purchases, etc.) the original order request, which includes the name of the ETTA employee to receive the equipment, will be documented by the administrative assistant and shared with the sales manager. In cases where the Directors office orders IT equipment that will be delivered to IT, proceed to step 6 of the procedure for purchases by IT.
2. The Director's Office purchasing representative will provide the ETTA sales manager with copies of the order(s).
3. The Director's Office purchasing representative will generally have the order delivered directly to the ETTA sales manager, or will notify the ETTA sales manager that the order has been delivered
4. See steps 5-7 in the procedures for regular bureau purchases.

##### **C. Purchases by IT:**

IT will purchase some computer equipment such as laptops, monitors and printers. In most cases, these purchases will be initiated by ETTA staff. However, there may be unique situations where

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equipment is purchased on a division or department level, such as division-wide laptop replacements.

1. ETTA employee discusses need for new computer equipment with supervisor. This includes purchases to re-stock extra computer equipment.
2. If approved by the supervisor, the supervisor begins a conversation with the employee who manages extra bureau IT equipment (database manager) to determine if existing equipment is available in the ETTA inventory for the employee to use. If not, the database manager will work with IT to get a quote.
3. The database manager obtains the quote from IT and submits the quote to the requesting employee's supervisor.
4. The quote must be approved by the requesting employee's supervisor and bureau chief. If approved, the quote is provided to the administrative assistant.
5. The administrative assistant notifies the database manager that the purchase has been approved and the database manager requests IT to make the purchase. The administrative assistant provides the appropriate budget code on the quote and provides budget code to IT when requested.
6. In most cases, the equipment will be delivered to IT and an IT employee will deliver the equipment to the employee and will set up the equipment. If the equipment requires additional set-up, the employee or employee's supervisor can request assistance from IT or the equipment manager. When the employee receives the equipment, the employee must notify his or her supervisor and the sales manager, so the inventory can be updated accordingly.

#### **D. General disposition of equipment and materials:**

Equipment, furniture, materials or other property of ETTA may eventually no longer serve the needs of individual or bureau. Certain items may be offered to bureau staff, other NCDOL units, may be transferred from individual inventories onto the general ETTA inventory, may be disposed of, or may be sent to state surplus.

1. ETTA employee discusses with supervisor, the need to dispose of equipment or materials.
2. The supervisor, with input from the bureau chief when necessary, will make the decision about whether the item can be disposed of in the trash or recycling, if the item should be transferred from an individual inventory to another inventory within or outside ETTA, or should be sent to state surplus.
3. When determining whether an item can be discarded, the supervisor will review the guidelines provided on the state surplus website: <https://ncadmin.nc.gov/news-state-surplus-property-agency>, and follow the procedures required for disposal.
4. If items will be offered to other bureaus within NCDOL, the supervisor will be responsible for initiating that communication, keeping the sales manager informed if items need to be transferred from the ETTA inventory to another.
5. All items to be surplussed must be approved by the supervisor and bureau chief.
6. Before placing the item in the basement publications room, the employee must document product name, description, make, model, serial number, where applicable, and send to the sales manager via email.
7. The sales manager will surplus items following procedures in APN 5. Items will be sent to

state surplus at least annually and more frequently, as needed.

**E. Inventory:**

1. In addition to the inventory items required by APN 4 to be documented, ETTA will also document the following items: phone headsets, webinar headsets, presentation pointers, rolling computer bags, wireless keyboards and mice, and standing desks.
2. ETTA inventory will be completed annually by May 1<sup>st</sup> to coincide with the NCDOL annual fixed asset inventory. All inventories will be confirmed, including personal inventories and inventories for equipment controlled by the bureau.
3. If items are removed or added to an employee's inventory, the employee must notify his or her supervisor and the ETTA sales manager.
4. When items are removed from any ETTA inventory (for surplus, transferred to another NCDOL inventory, disposed of, lost/stolen), the item will be tracked by the sales manager to indicate when, why, and to where the item was moved.

**F. Effective Date:**

This policy is effective on the date of the signature and remains in effect until rescinded or amended.

  
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Wanda Lagoe  
Bureau Chief

12/12/2022  
\_\_\_\_\_  
Date

**Note: This policy will be covered during ETTA new employee orientation.**