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| Region 9 AAA | Local Policy # | 6a |
| Policy Name | Property Management Inventory Schedule (Subcontractor Equipment Inventory) | |
| Original Policy Date | 2006 | |
| Review/Revise Date | January 4, 2013, March 10, 2014, November 2016, September 2021 | |

Policy:

Each Subcontractor must provide a complete inventory of equipment by site for items purchased with state or federal dollars. Any changes in inventory must be reported to the Area Agency on Aging, preferably as they occur, but no later than the end of the fiscal year (September 30th).

Procedures:

1. Any equipment purchased with contracted federal or state dollars is considered the property of the Area Agency on Aging and must stay within the region.
2. Equipment with a value of \$5,000 or more will be tagged by the Area Agency on Aging and must be included on the inventory list each year.
3. If possible, when reporting inventory to the Area Agency on Aging, include the funding source (federal or state), the item purchased, cost, and location of the item. A notation of an asterisk (*) should be placed by any state equipment grant funds.
4. The Area Agency on Aging does not require a list of equipment purchased with other funds such as local, millage, fundraisers, donations, etc. However, it is highly recommended that each subcontractor maintain an inventory list categorized by funding source to ease recovery efforts for insurance purposes.
5. The Area Agency on Aging will track items with a purchase price of \$5,000 or more. Area Agency on Aging staff will verify inventory lists each year with an onsite visit or other acceptable means.
6. All items appearing on the Area Agency on Aging Inventory Tracking List will continue to be tracked until said item is disposed.

An Area Agency on Aging Equipment Inventory Form is available upon request.

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| Region 9 AAA | Local Policy # | 6b |
| Policy Name | Property Disposal | |
| Original Policy Date | March 2011 | |
| Review/Revise Date | January 4, 2013, March 10, 2014, November 2016, September 2021 | |

Policy:

Any Subcontractor that seeks to dispose of equipment purchased with federal or state funds must seek written approval from the Area Agency on Aging prior to the disposal of any items.

Procedures:

1. The Subcontractor must submit a written plan for equipment disposition to the Area Agency on Aging prior to disposing of the equipment.
2. Upon receipt of the plan, the Area Agency on Aging will review and, if in agreement with the plan, provide written approval back to the Subcontractor.
3. Any equipment (original purchase value of \$5,000 or more) obtained with contracted federal or state dollars is considered the property of the Area Agency on Aging and efforts must be taken to keep the equipment within the region. If the Subcontractor no longer has use for the item or it is no longer a viable piece of equipment, it may be transferred to another non-profit within the region (preferably within the aging network) with approval from the Area Agency on Aging.
4. Equipment items cannot be sold or given to someone that is not a non-profit agency without approval from the Area Agency on Aging.
5. If no other non-profit agency wants the equipment, the equipment must be either:
 - a. Disposed of through the Department of Management & Budget (DMB) via AASA, or
 - b. Transferred to DMB State Surplus via AASA.
6. When disposing of computer or copy equipment, it should be noted that AASA requires, effective March 22, 2012, all hard drives be wiped clean professionally prior to disposal and written certification as to how the item was disposed is to be sent to the Area Agency on Aging. Although this policy does not apply to equipment purchased with other local funds, it is required by HIPAA that if any items contain or store confidential information, they too, must be properly disposed.
7. All items appearing on the Area Agency on Aging Inventory Tracking List prior to the effective date of this policy are also subject to the disposal procedures detailed here.