

**PARTICLE PHYSICS DIVISION OPERATING MANUAL  
REVIEW AND APPROVAL RECORD**

**POLICY ON LOAN AGREEMENTS**

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PPD Head

## PPD POLICY ON LOAN AGREEMENTS

### INTRODUCTION

The Fermilab policy governing the loan of equipment and property assets to organizations within or outside of the DOE complex, other institutions and agencies resides on the Business Services Section homepage.

The primary web address is as follows:

[http://bss-support.fnal.gov/products/sup\\_book.nsf/wp/main](http://bss-support.fnal.gov/products/sup_book.nsf/wp/main)

Select Property Management, Property Utilization, and then “Loan of Property to outside Organizations” for detailed guidelines and forms.

### RESPONSIBILITIES

#### **To originate the loan request:**

The requestor must obtain prior approval from the PPD Division Head for each new loan or addition to any existing loan. The appropriate forms can be obtained either from the PPD Department Head for Support Services or from the Fermilab Property Office website indicated above. Prior to approval by the PPD Division Head, the original loan request is reviewed for completeness by the PPD Department Head for Support Services.

The initial period of any loan may not exceed one (1) year and it may be renewed in increments not to exceed one year. The Department Head for Support Services will maintain a copy of the request and will review it annually with the requestor for possible renewals and or disposition. It is the loan requestor’s responsibility to coordinate an annual inventory of all items on loan. An email from the organization or institution in possession of the assets would be sufficient. Without this inventory, the Fermilab Property Office can terminate the loan immediately as it is their responsibility to ensure that government assets are being properly maintained.

The Property Office is responsible for making the determination as to whether the items will be loaned under a numbered Loan Agreement or as part of a Collaborative Agreement. In any case the Property Office must be advised of all assets shipped to collaborations located at facilities not on the Fermilab Batavia site.

#### **Upon termination of a loan agreement:**

Generally a loan is renewed for no more than two terms (of one year each) so that a more permanent and manageable disposition can be made of the property. At that time, a decision must be made as to what happens with the equipment/property. The options are listed below beginning with the most preferred:

- a) The property is returned to Fermilab.
- b) Stewardship may be transferred to the holding Institution if that institution has a DOE contract.
- c) The property may be declared as “excess” and the Fermilab Property Office will take the appropriate action to list the property on the “Energy Automated Disposal System, “EADS, “ or Materials Exchange Program, (MEP).
- d) The property may be abandoned in-place or sold as scrap in accordance with regulations governing this action, whether within the United States or in a foreign country. Abandoning assets in a foreign country is the least desirable and least successful option due to roadblocks created by documentation and other factors beyond our control. It is virtually impossible to abandon loaned assets in a foreign country.

In all instances, the requestor is required to contact the PPD Division Office to coordinate the disposal, transfer or return of the property assets through the Fermilab Property Office.