

Standard Operating Procedure

Asset Management

PC-SOP-GA-004-v05

Revision History

Version	Reason for revision	Date
05	Updating to reflect change from PERFORM Centre to School of Health (SOH) Removal of Non-SOH equipment references	October 25, 2024

1. Introduction

This Standard Operating Procedure (SOP) provides guidelines on how School of Health (SOH) assets in the PERFORM Centre (PC) building are accessed and managed. The SOP does not replace University policies on Asset Management.

The purpose of this SOP is to provide the minimum guidelines regarding expectations, rights, and obligations of all the parties that use SOH assets. The Concordia University asset management policies precede this SOP. The SOP does not cover consumable inventory management.

2. User Responsibilities

- Any user of the PERFORM Centre looking to bring, borrow, move or remove equipment will be responsible for reading this SOP.
- It is the responsibility of the SOH staff to support equipment needs of researchers within the boundaries laid out in this SOP.

3. Relevant Documents

- Capital, Asset Management, Funding and Financing Policy [CFO-4.pdf \(concordia.ca\)](#)
CFO-4

- Enterprise Asset Management Program
[ConcordiaUniversityEnterpriseAssetManagementProgramOverview2020-12-08.pdf](#) (Tr-Corporate Risk)
- Security Policy [SCOPE \(concordia.ca\)](#) VPS-20

4. General Conditions

The SOH maintains a variety of shared spaces and equipment in the PC building. The following guidelines are designed for optimal usage of the infrastructure, while ensuring its appropriate use and longevity.

- The SOH platform manager/supervisor will determine the training needs required for use of SOH equipment in the PC building. The level of supervision required will be at the discretion of the platform manager/supervisor depending on the equipment and its desired use.
- It will be the user's responsibility to ensure that they follow all SOH SOPs and Platform Operating Documents (PODs) when using SOH equipment in the PC building.
- Unauthorized, or inappropriate, use of any equipment in the PC building will risk forfeiture of usage privileges and access.
- All users of SOH equipment in the PC building will use the online booking scheduler (PC-POD-GA-001). If booking equipment for another user, details about user must be indicated in the booking request.
- Should any property of Concordia University be lost, stolen or damaged, the appropriate report and procedures will be followed according to current policies of Concordia University referred to in CFO-4, VPS20 and Tr-Corporate Risk.

5. Asset Management of SOH Equipment in the PC building

SOH asset management will follow the Concordia University policy on capital asset management outlined in CFO-4, VPS20 and Tr-Corporate Risk with some additional requirements as follows:

5.1 Inventory management

- Any changes to the SOH infrastructure in the PC building should be reported to the Administrator, Budget and Personnel (or relevant) which will then be reported as required to the relevant sector of the University.
- The managers / supervisors of each platform should ensure that the asset inventory list is up-to-date for their designated area and that the University's asset management policies are adhered to with regard to moving and decommissioning of the equipment.
- Users should report any damaged, lost or stolen infrastructure to the manager/supervisor of the platform.

5.2 Maintenance of equipment inventory system

- All equipment inventory in the PC building will be tracked using an electronic inventory management system as instituted by Concordia University and/or the SOH.
- The following information will be captured for each piece of equipment:

Concordia University tag number	Equipment description	Manufacturer
Model number	Serial number	Acquisition (Month/Year)
Purchase order number	Preparer's contact details	Last inventory check date
Bar code number	Room number	Comments

- A physical inventory count will be made by the platform managers/supervisors once a year (or as needed) and shared with the Administrator, Budget and Personnel (or relevant) and the Associate Dean, Research and Infrastructure who will share this information with other SOH administration as required. The inventory count should produce a report on the status of each piece of equipment.

5.3 Equipment Tags

All equipment in the PC building must be tagged with the Concordia University's inventory bar code with a unique number. In cases where it is not possible to tag the actual instrument (such as centrifuge rotors, EEG caps, etc.), it will be at the discretion of the relevant platform manager/ supervisor as to how to track these items to ensure the required information is captured.

5.4 Acquisition and decommissioning of equipment

- Any infrastructure that is brought into and permanently left in the PC building and is maintained or managed by SOH staff is considered to be SOH infrastructure.
- Acquisition of new equipment in the PC building must be approved by and reported to the platform managers/supervisors and/or with the Administrator, Budget and Personnel (or relevant), and then to the Associate Dean, Research and Infrastructure, Director, and Dean as required. The proper inventory processes described above must take place before equipment is put into service.
- Decommissioning of equipment by platform managers/ supervisors will require authorization from the Associate Dean, Research & Infrastructure (or relevant), and will follow Concordia University's current asset management policy for decommissioning equipment.

5.5 Moving equipment

- Anyone wanting to move equipment from the PC building must complete the School of Health Equipment moving form and have it approved by the platform manager /

supervisor. All equipment will be inspected by the manager / supervisor prior to the move and upon its return.

- Permanently removing any equipment from the PC building and/or moving any large equipment will require the written consent of the Associate Dean, Research & Infrastructure (or relevant). For large equipment, collaboration of the SOH's Facilities Coordinator is required to execute the actual move.

5.6 Damaged, lost, or stolen equipment

In the case where equipment belonging to the PC building is damaged lost or stolen, a detailed report must be completed by the area manager / supervisor with the Administrator, Budget and Personnel (or relevant) and reported to the Associate Dean, Research & Infrastructure.