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April 4, 1988

PD 88-01

TO: Vice Presidents, Associate Vice Presidents, Deans, Directors, and Department Chairs

FROM: Gail Fullerton   
President

SUBJECT: PD 88-01 EQUIPMENT MAINTENANCE LOGS

This presidential directive is intended to remove a deficiency reported to the Board of Trustees by the Trustee auditors who recently conducted an audit of procurement, maintenance, reporting, and security of equipment on this campus. The Trustee auditors found that equipment maintenance logs are not generally maintained at San Jose State University. Such logs are considered a necessary basis for appropriate decisions regarding expenditure for maintenance and replacement of equipment.

The Trustee auditors recommended that "maintenance logs, including cost of maintenance, by individual equipment items be established." The campus accepted this recommendation and created a committee with representatives from operational areas that have significant equipment inventories to recommend procedures for implementing the Trustee auditors' recommendation. This committee noted that various campus departments have widely differing equipment needs and inventories, and that it did not seem feasible to have one campus standard for equipment maintenance records. The recommendation of the committee was that each department be responsible for establishing department-specific objectives and procedures for recording equipment maintenance in an appropriate log.

The following guidelines, suggested by this committee, are to be implemented as soon as possible but no later than June 30, 1988.

Each Department Chair or Director is responsible for the development and implementation of an equipment maintenance log for all equipment assigned to the area under his or her supervision. In establishing the equipment maintenance log appropriate for a particular department or other administrative unit, the following should be considered:

°Should the maintenance log be used to determine when it is less expensive to replace an item than to continue repairing it?

°Should the maintenance log be used to determine when to place equipment on maintenance contract rather than requisitioning maintenance only when an item malfunctions?

°Should the maintenance log be used to provide evidence of the safety and reliability of equipment?

°Does the maintenance log meet federal and state requirements for equipment records (this typically applied to equipment that poses high safety risks if it is not adequately maintained)?

Once the objectives to be achieved by the equipment maintenance logs for a department are identified, each director or department chair is responsible for defining the types of equipment held by the department on which maintenance records should be kept. The following information items should be included on each item of equipment on which a record is kept:

**EQUIPMENT INFORMATION**

**SERVICE INFORMATION**

Description of equipment item

Date of service

Date purchased or received as gift

Description of service performed

Vendor or donor name

Name of person or firm performing service

PO number (if purchased)

Purchase price or fair market value of gift

Cost of service:  
SJSU technician time required  
cost of off-campus labor  
cost of replacement parts

Date of next scheduled service

This is not a directive to every department to keep equipment maintenance records on all items. However, it is the responsibility of each department or other administrative unit to determine the objectives of equipment maintenance records appropriate to that department or unit, to determine which items of equipment should be included on a maintenance log in order to achieve those objectives, and to establish and maintain equipment logs accordingly.

Your cooperation is appreciated.

GF:lvh

cc: Chancellor W.A. Reynolds