

UC Davis Policy and Procedure Manual

Chapter 350, Supplies and Equipment

Section 19, Procurement, Use, and Maintenance of Microscopes

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Responsible Department: Microscope Services

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I. Purpose

This section outlines policy and procedures relating to the procurement, use, and maintenance of optical microscopes through Microscope Services.

II. Definitions

- A. Departmentally owned microscope—microscopes that are part of a department's inventory, not rented through microscope services.
- B. Pool microscope—campus microscopes in the possession and control of Microscope Services, who is responsible for renting, tracking, maintaining, and collecting replacement depreciation funds.

III. Policy

- A. The procurement, distribution, and maintenance of teaching microscopes shall be managed to maximize their use for the lowest overall cost and to accrue adequate reserves for their replacement at the end of their useful life.
- B. All microscopes used for graduate and undergraduate instruction, unless used primarily for research or patient care, are procured, maintained, and assigned by Microscope Services.
- C. Microscopes purchased with University funds, except Federal contract and Federal grant funds, are the property of Microscope Services unless their primary use is for research or patient care.

IV. Management of Pool Microscopes

- A. Assignment
 - 1. Microscopes are assigned to departments on a quarterly rental basis or as requested for short-term use within the quarter.
 - 2. Departments that initiate requests for the purchase of pool microscopes for teaching shall have first priority for their assignment.
 - 3. Microscopes purchased for instructional use may be assigned for research use if they are excess to current teaching needs. Such instruments may be recalled at any time to fill instructional needs.
- B. Rental rates
 - 1. Rates are based upon the value of the instruments (to maintain a replacement reserve fund and recover depreciation), maintenance costs, the expected level of use of the instruments, and the operating expenses of the pool.
 - 2. Microscope rental rates are reviewed by the Professional Staff Rate and Service Activities Advisory Group (Rate Group) and approved by the Vice Chancellor--Administration.
 - 3. No rental fee is charged for excess microscopes returned to the pool by the end of the second week of classes each quarter, provided that the number returned is no more than 10% of the total requested and assigned to the department at the beginning of that quarter. A service charge equal to 2 weeks' rental fee is charged for returned microscopes exceeding 10% of the total assigned.

4. For microscopes requested for short-term use, a service charge in addition to the rental fee is made to recover the costs of delivery, setup, and return.
 5. The quarterly charge rate applies to instruments used during Summer Sessions and for research.
 6. Pool microscopes purchased by exception with departmental (non-Microscope Services) funds for use other than teaching, or purchased as high-value one-time acquisitions, are not amortized.
 - a. Depreciation funds will not be collected for replacement of these microscopes.
 - b. The quarterly rental rate charged the host department is for normal maintenance only, for a period not exceeding 20 years from the date of purchase.
- C. Responsibility for maintenance, loss, and damage
1. All pool microscopes are checked and serviced by Microscope Services personnel before they are distributed.
 - a. Instruments should also be checked by the department at the time of delivery.
 - b. Any defects should be recorded on the custody receipt and reported promptly to Microscope Services.
 2. Microscopes shall be stored in locked, immobile, dust-free storage during periods of nonuse (e.g., academic quarters when not used).
 3. Costs incurred through loss or damage to rented instruments are charged to the departments to which they are assigned.
 - a. Pool microscopes that have been disassembled or otherwise abused will be recalled to the pool. Costs of restoring such instruments to workable condition for classroom use will be charged to the responsible department.
 - b. If a pool microscope is lost while in the custody of a renting department, the department must pay an amount equaling the resale value of the instrument plus that portion of its original cost that has not yet been accumulated in the reserve fund.
 - 1) The responsible department may choose to pay the required amount immediately or over 3 years from the date of the reported loss.
 - 2) As an alternative to payment for replacement of a lost microscope, a department may provide a like-or-better replacement microscope. The Materiel Management Business Manager must be informed of intention to provide a replacement within 90 days of the department's Report of Property Loss or Damage (see C.4, below). The replacement microscope must be transferred to the Microscope Services inventory within one year from the report of loss. Any costs for engraving, renovation, or modification of the replacement microscope will be charged to the responsible department.
 - 3) If a lost microscope is subsequently found in usable condition, Microscope Services will refund to the department all except the amounts that would have normally been charged since the loss was reported.
 - 4) If the found microscope was replaced with a like-or-better microscope, that microscope may be returned for research purposes, as is, to the responsible department in exchange for the found microscope. Microscope Services may retain the microscope if the department does not have a research need for it.
 4. It is the responsibility of the renting department to report microscope loss or theft to Microscope Services. Microscope Services will initiate additional actions and reports to

the University Police Department, and the Risk Management Office, as outlined in Section 350-85.

D. Movement of microscopes

Pool microscopes may only be moved in accordance with Section 350-70. Microscope Services must be notified immediately of any change in assigned location.

1. Microscopes to be removed from campus must be packed to prevent breakage and secured against theft during transportation.
2. Microscopes to be removed from campus must be insured by the renting department for their replacement value. Microscopes damaged in transit must be returned to Microscope Services immediately for assessment of damage.

V. Procedures

A. Rental of microscopes

1. Lists of available microscope types and applicable rental rates are available on request from Microscope Services and can also be found on the Microscope Services website at <http://materiel.ucdavis.edu/microscope/>.
2. To ensure availability of significant rental requests (i.e., 10 or more microscopes), departmental requests for assignment of pool microscopes should be submitted to Microscope Services at least six months in advance of the time the instruments are needed.
3. Requests should be submitted in writing and include the following information:
 - a. The intended use of the instruments (i.e., teaching or research).
 - b. Account numbers to which microscope rental fees are to be charged, including changes to billing accounts, and replacement accounts for expiring accounts or grants.

B. Inventory control

Microscope Services personnel take periodic physical inventories of microscopes in departmental custody. Departments must assist Microscope Services staff as necessary to help locate missing microscopes and accessories.

C. Purchase of microscopes

1. The specialized needs of certain courses may justify requests for special instruments to be purchased by the pool. Such requests should be addressed to the Materiel Management Business Manager and should be submitted at least one year before the instruments are needed.
2. The Materiel Management Business Manager generally will not approve requests for expensive, sophisticated instruments for instructional purposes if inexpensive or existing instruments would adequately serve the same purpose.

VI. Further Information

- A. Microscope Services will repair and adjust departmentally owned microscopes as time and workload permits. An approved hourly rate is used for such services. Contact Microscope Services for information regarding service.
- B. Additional information is available at the Microscope Services Web site, <http://materiel.ucdavis.edu/microscope/>. Questions can be directed to the Materiel Management Business Manager, (530) 757-8707.