

## Equipment Gift Procedural Requirements

Approval for acceptance of equipment gifts will not be granted unless all the procedural steps listed below are satisfied. The actual equipment gift cannot arrive at Berkeley Lab until after the gift is officially accepted.

1. The Gift Coordinator must receive the donor letter. Then the Gift Coordinator alerts the Principal Investigator (PI) and Resource Analyst (RA), who are both associated with the particular gift via the gift processing computer system eSRA.
2. The PI, RA and Division Director/Head must complete the required steps in eSRA per Gifts Desk Guide for eSRA, including completing the UDEV100 (LBNL Gift Acceptance Form), 700U if required, and the divisional safety review.
  - a. If the PI of the gift is the Division Director, then the Division Director must go to one above his level for approval of the gift.
3. The Division submits the documentation to the Gift Coordinator via eSRA to review for completeness, accuracy, and adherence to policy. The Gift Coordinator will ensure that the Division has provided evidence that the safety evaluation and clearance have been completed for the proposed equipment.
4. The Gift Coordinator provides initial approval via eSRA so the equipment gift can be inspected by qualified Subject Matter Experts (SMEs) with the Environment, Health & Safety (EHS) Division who will need to provide their approval via eSRA.
5. The gift will then pass on to the Laboratory Director via eSRA for review and approval.
6. The Gift Coordinator will then forward the necessary forms to UCOP via email. If the gift is over \$100,000, it requires UCOP approval. If the gift is \$100,000 or less, UCOP is simply notified of the accepted gift.
7. When approvals are completed and the Gift Coordinator logs the final approval in eSRA, the system will automatically notify the Division Reviewers, PI, Post-Award RA, Property Management, EHS, and Division Equipment Managers that the donation has been approved so action may be taken to ship and accept receipt of the equipment.
8. The accepted equipment must be delivered directly to PI's designated location. Once delivered to the site, the Division Property Representative or Custodian needs to inform Property Management, who will place a "Property of Others" tag on the equipment.
9. In the event that LBNL has equipment on site through a borrow agreement with an external organization, and the organization determines at the end of the borrow agreement to allow LBNL to keep the equipment, the above equipment gift procedures should be followed.