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NASA Procedural Requirements

COMPLIANCE IS MANDATORY

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Subject: NASA Personal Property Disposal Procedural Requirements (Revalidated 2/17/06 with Change 1)

Responsible Office: Logistics Management Division

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Chapter 9. Report Requirements

9.1. Background

This chapter sets forth the authority and procedures related to reporting disposal activity for NASA-owned personal property. This includes idle, excess, surplus and exchange/sale personal property, including onsite or offsite contractor, and grantee held property. Personal property may be physically located within the United States and its territories or in foreign countries.

9.1.2. The information reported by Center PDO's will be consolidated and analyzed by the NASA Headquarters, Warehousing and Disposal Program Manager. The information and data from these reports will be provided to NASA management and/or provided to external agencies and Congress when requested by external reporting requirements or inquiries.

9.2. Guidance Information

Regulations contained in the Federal Property and Administrative Services Act of 1949, require the reporting on the disposition and acquisition of idle, excess, surplus, and exchange/sale personal property. Additionally, NASA Headquarters, Security, Logistics, Aircraft and Industrial Relations Division, requires information to monitor the performance of the disposal programs and to prevent waste, fraud, and abuse.

9.3. General Report Requirements

9.3.1. The PDO at each NASA Center and the Jet Propulsion Laboratory will prepare or oversee the preparation of the reports required by this chapter. The required reports are as follows:

- (1) Property Held by the PDO Report. (No longer required)
- (2) Annual Report of Utilization and Disposal of Domestic NASA Personal Property.
- (3) Annual Report of Exchange/Sale Transactions.
- (4) Report of Activities Generating Precious Metals.
- (5) Annual Report of Personal Property Provided to Non-Federal Organizations.
- (6) Reports of Negotiated Sales.
- (7) Performance Measure - Timeliness of Disposal.
- (8) Annual Report of Utilization and Disposal of Foreign NASA Personal Property.

(9) Property Held by the Property Disposal Officer Report

9.4.1. The Property Held by the Property Disposal Officer Report is no longer required per the NASA Agency Financial Management Manual.

9.5. Annual Report of Utilization and Disposal of Domestic NASA Personal Property

9.5.1. The Annual Report of Utilization and Disposal of Domestic NASA Personal Property and completing instructions are reflected in Appendix B. The Report is required to provide management oversight of the disposal programs. This report is the primary source used by the Manager, Warehousing and Disposal Programs, NASA Headquarters, to prepare the Annual Report of Utilization and Disposal of Excess and Surplus Property. The Annual Report of Utilization and Disposal of Domestic NASA Personal Property is prepared on a fiscal-year basis for the Jet Propulsion Laboratory and each NASA Center, including data for Component Facilities, contractors, and grantees. The PDO at each NASA Center and the Jet Propulsion Laboratory will prepare or oversee the preparation, consolidation, and transmittal of the report to the Manager, Warehousing and Disposal Programs, NASA Headquarters, by October 30th of each year. Negative reports are required.

9.5.2. The Annual Report of Utilization and Disposal of Domestic NASA Personal Property indicates the volume of NASA-owned idle, excess, and surplus domestic personal property reported for disposal processing and breakouts showing the actual method of disposition for the property. The report contains NASA-owned personal property including (onsite or offsite) contractors, and grantee held NASA property. The report indicates the volume of idle or excess personal property transferred between NASA Centers and the volume received from other Federal agencies. The report indicates monies or credit (sale proceeds) received from the sale of NASA surplus usable or scrap personal property.

9.5.3. The Annual Report of Utilization and Disposal of Domestic NASA Personal Property applies to all NASA Centers, the Jet Propulsion Laboratory, and NASA Component Facilities. The report applies to NASA-owned domestic personal property, including NASA contractor and grantee-held property. The PDO may gather information from many different organizations and source documents. Source documents may include the signed appropriate disposal turn-in documents, transfer documents, sales documents, abandoned or destroyed documents, and summary reports.

9.5.4. Each NASA Center will establish and issue local procedures for acquiring information and the source documents needed to prepare the Annual Report of Utilization and Disposal of Domestic NASA Personal Property. These local procedures will establish timeframes for the submission of the appropriate summary data to the PDO. The local procedures should include the implementation of NASA Federal Acquisition Regulation Supplement 18-45.615 by deciding whether the NASA Center Industrial Property Officer or the PDO will receive the Standard Form 1424, Inventory Disposal Report. The local procedures will also identify the individual responsible for totaling the data contained on the Standard Forms 1424 received each year for inclusion on the Annual Report of Utilization and Disposal of Domestic NASA Personal Property.

9.5.5. For the purposes of the Annual Report of Utilization and Disposal of Domestic NASA Personal Property, domestic property is idle, excess, or surplus personal property physically located inside the United States, the District of Columbia, the Commonwealth of Puerto Rico, American Samoa, Guam, the Commonwealth of the Northern Mariana Islands, the Virgin Islands, and the Trust Territory of the Pacific Islands which includes Palau and the former trust areas of the Federated States of Micronesia and the Marshall Islands.

9.5.6. The Annual Report of Utilization and Disposal of Domestic NASA Personal Property should not include exchange/sale property nor foreign property.

9.5.7. The NASA Property Disposal Management System (NPDMS) can computer generate the report 010 which summarizes all disposal transactions processed using NPDMS. Transfer transactions not processed in NPDMS will need to be manually added to the report.

9.6. Annual Report of Exchange/Sale Transactions

9.6.1. The Annual Report of Exchange/Sale Transactions, reflected in appendix C, is required to provide management oversight of the disposal program. This report is the primary source used by the Manager, Warehousing and Disposal Programs, NASA Headquarters, to prepare the consolidated NASA Annual Report of Exchange/Sale Transactions submitted to GSA, by December 29th of each year. The Annual Report of Exchange/Sale Transactions is prepared on a fiscal-year basis for the Jet Propulsion Laboratory and each NASA Center, including data for Component Facilities, cost-reimbursement contractors and grantees. The PDO at each NASA Center and the Jet Propulsion Laboratory will prepare or oversee the preparation, consolidation, and transmittal of the report to the Manager, Warehousing and Disposal Programs, NASA Headquarters, by November 14th of each year. Negative reports are required.

9.6.2. The Annual Report of Exchange/Sale Transactions indicates the volume of NASA-owned personal property that was exchanged or sold for replacement purposes to acquire similar items during the fiscal year. The report

includes NASA-owned personal property, including that held by onsite and offsite NASA contractors and grantees located in any part of the world. The report segregates exchange/sale property transactions by type of transaction as exchange or sale, geographic location as domestic versus foreign, source of property, and historical items. For property that was exchanged, the report indicates the line items exchanged, total original acquisition cost of the property exchanged, and the exchange allowance received, broken down by the 2-digit Federal supply classification groups. For property that was sold, the report indicates the line items sold, total original acquisition cost of the property sold, and the sales proceeds received, broken down by the first 2-digit Federal supply classification groups, and the cost of sales.

9.6.3. The Annual Report of Exchange/Sale Transactions applies to all NASA Centers, Jet Propulsion Laboratory, and all NASA Component Facilities. The report applies to all NASA-owned personal property including NASA contractor and grantee-held property located anywhere in the world that was replaced using the provisions of exchange/sale. Source documents may include disposal turn-in documents, the signed procurement documents, or supply requisition documents for exchange transactions to a vendor. Standard Form 122 transfers documents and/or sales documents for property that could not be exchanged with a vendor and must be sold.

9.6.4. Each NASA Center will establish and issue formal local procedures for acquiring information and source documents needed to prepare the Annual Report of Exchange/Sale Transactions. These local procedures should establish timeframes for the submission of summary data to the PDO.

9.6.5. For the purposes of preparing the Annual Report of Exchange/Sale Transactions, the following terms are provided for clarity:

(1) "Acquire" means procure, purchase, or obtain in any manner, including transfer and manufacture or production, at Government-owned or-operated plants and facilities. Obtain in any manner includes lease of property.

(2) "Domestic" means the States of the United States, the District of Columbia, the Commonwealth of Puerto Rico, the Commonwealth of the Northern Mariana Island, American Samoa, Guam, the Trust Territory of the Pacific Island, and the Virgin Islands.

(3) "Exchange" means to replace a nonexcess personal property item by trade or trade-in with the supplier of the replacement item when the value of the replaced item is used to reduce or offset the cost of the acquired item. The supplier may be a Government agency, commercial or private organization, or an individual.

(4) "Foreign" means all other areas of the world excluding the States of the United States, the District of Columbia, the Commonwealth of Puerto Rico, the Commonwealth of the Northern Mariana Island, American Samoa, Guam, the Trust Territory of the Pacific Islands, and the Virgin Islands.

(5) "Historic Item" means property having added value for display purposes because of its historical significance that is greater than the fair market value of the item for continued use. Items that are commonly available and remain in use for the intended purpose, such as military aircraft still in use by active or reserve units, would not be regarded as historic items.

(6) "Replacement" means and is limited to the process of acquiring property specifically to be used in place of property that is still needed but will no longer adequately perform all the tasks for which it was used.

9.7. Report of Activities Generating Precious Metals

9.7.1. Report of Activities Generating Precious Metals, Standard Form 291, is required to provide management oversight of the disposal programs. This report is used by the Manager, Warehousing and Disposal Programs, NASA Headquarters, to prepare the consolidated NASA annual report. The Report of Activities Generating Precious Metals is prepared on a fiscal-year basis for the Jet Propulsion Laboratory and each NASA Center and includes data for Component Facilities, cost-reimbursement contractors, and grantees. The PDO at each NASA Center and the Jet Propulsion Laboratory will prepare or oversee the preparation, consolidation, and transmittal of the report to the Manager, Warehousing and Disposal Programs, NASA Headquarters, by October 20 of each year. Negative reports are required.

9.7.2. The Report Of Activities Generating Precious Metals indicates specific information regarding the types of silver and other precious metal-bearing equipment and materials processed for recovery of precious metal content. The report includes NASA-owned personal property, including that held by onsite and offsite NASA contractors and grantees located anywhere in the world. The report indicates the volume of materials processed for recovery, the potential and actual amount of precious metals recovered, and the estimated savings based on the market value of the precious metals recovered.

9.7.3. The Report of Activities Generating Precious Metals is required for all NASA Centers, the Jet Propulsion Laboratory, and NASA Component Facilities. The report applies to all NASA-owned domestic personal property, including NASA contractor-and grantee-held property. The source of the data may include photographic laboratories, production activities, medical activities, and surveys. Each NASA Center will establish and issue formal local procedures identifying the various organizations that will be required to gather the data and source documents

needed to prepare the Report Of Activities Generating Precious Metals. These local procedures should establish timeframes for the submission of summary data to the PDO.

9.8. Annual Report Of NASA Personal Property Provided To Non-Federal Recipients

9.8.1. The Annual Report of NASA Personal Property Provided To Non-Federal Recipients, reflected in appendix E, is required to provide management oversight of the disposal programs. This report is the source used by the Manager, Warehousing and Disposal Programs, NASA Headquarters, to prepare the consolidated Annual Report of NASA Personal Property provided to Non-Federal Recipients, submitted to the GSA, by December 29 of each year, as required by section 202(e) of the Federal Property and Administrative Services Act of 1949, as amended, 40 U.S.C. 483, and FPMR 41 CFR 101-43.4701(c). The Administrator of GSA submits a report to Congress, summarizing and analyzing the reports of the Executive agencies. The report is used to identify the various alternative disposition methods and volume of personal property provided to non-Federal recipients, along with its positive or negative impact on the disposal programs.

9.8.2. The Annual Report of NASA Personal Property Provided to Non-Federal Recipients is prepared on a fiscal year basis for the Jet Propulsion Laboratory each NASA Center, NASA Component Facilities, and cost reimbursement contractors and grantees. The PDO at each NASA Center and the Jet Propulsion Laboratory will prepare or oversee the report and forward to the Manager, Warehousing and Disposal Programs, NASA Headquarters, by November 14 of each year. Negative reports are required.

9.8.3. The Annual Report of NASA Personal Property Provided to Non-Federal Recipients indicates NASA-owned personal property and to be no longer required or obtained as excess property from another Federal agency and furnished to any recipient other than a Federal Agency. The report provides the name and address of each recipient and the total original acquisition cost of the property furnished to each recipient, identified by the applicable 2-digit Federal Supply Classification Group.

9.8.4. The Annual Report of NASA Personal Property Provided to Non-Federal Recipients is required for to all NASA Centers, the Jet Propulsion Laboratory, and all NASA Component Facilities. The report applies to all NASA-owned domestic personal property, including NASA contractor-and grantee-held property. The PDO may gather information from various organizations such as Grant Control Activities, Loan Control Activities, Exhibit Control Activities, and source documents. Source documents may include the signed, appropriate disposal turn-in documents, Standard Form 122 transfer documents, loan documents, grant documents, and exhibit documents.

9.8.5. Each NASA Center will establish and issue formal local procedures identifying the various organizations that will be required to gather the data and source documents needed to prepare the Annual Report of NASA Personal Property Provided to Non-Federal Recipients. These local procedures should establish timeframes for the submission of the appropriate summary data to the PDO.

9.8.6. For the purposes of the Annual Report of NASA Personal Property Provided to Non-Federal Recipients, the following terms are provided for clarity:

- (1) "Personal Property" is that which includes equipment, materials, and supplies, but excludes real property.
- (2) "Excess personal property" is that which is under the control of any Federal agency that is not required for its needs and the discharge of its responsibilities, as determined by the head of that agency.
- (3) "Appropriation" is the major categories of funds made available by Congress to NASA in appropriations bills. This does not apply to subaccounting levels established by NASA internally.
- (4) The term "within the United States" includes the 50 States, the District of Columbia, the Commonwealth of Puerto Rico, the Virgin Islands, Guam, American Samoa, Commonwealth of the Northern Mariana Island, and the Trust Territory of the Pacific Islands. The Trust Territory of the Pacific Islands includes Palau and the former trust areas of the federated states of Micronesia and the Marshall Islands.
- (5) The phrase "furnished in any manner whatsoever" includes but is not limited to transfer, loan, lease, license agreement, and sale transactions.
- (6) The term "non-Federal recipients" includes all contractors, grantees, and any other individuals or organizations that are not a Federal agency. State and local government entities are regarded as non-Federal recipients.
- (7) "Federal agency" means any Executive agency or any establishment in the legislative or judicial branch of the Government except the Senate, the House of Representatives, and the Architect of the Capitol, and any activities under the Architect's direction.
- (8) The phrase "NASA-owned personal property determined to be no longer required for the purposes of the appropriation from which it was purchased" includes (a) property that was no longer needed for direct NASA use by the organization unit accountable for the property, and was subsequently furnished during the reporting period to a non-Federal recipient rather than placed in the NASA Center's internal redistribution or disposal programs; and (b) property that entered the NASA Center's internal distribution or disposal programs, and was subsequently furnished

during the reporting period to any non-Federal recipient.

(9) The phrase "obtained as excess property" includes personal property that was obtained from another Federal agency under the provisions of Federal Property Management Regulations, 41 CFR 101-43.

9.8.7. The Annual Report of NASA Personal Property Provided to Non-Federal Recipients should not include exchange/sale property or foreign property. NASA-owned personal property that was determined to be surplus that was disposed of by donation, sale, abandonment, or destruction under the provisions of Federal Property Management Regulations, 41 CFR 101-44 or 101-45, should not be included in the report. With respect to reporting "NASA-owned personal property determined to be no longer required for the purposes of the appropriation from which it was purchased," NASA activities are not required to research acquisition, inventory, or maintain accountable property records to determine the source of this property or the appropriation from which it was purchased.

9.9. Report Of Negotiated Sales By NASA or Agent

9.9.1. While it is Federal policy to sell property after publicly advertising for bids, property also may be sold by negotiation, subject to obtaining appropriate approvals and competition. Any negotiated sales of NASA-owned property, including contractor inventory, must be fully and adequately justified. According to section 203(e)(6) of the Federal Property and Administrative Services Act of 1949, 40 U.S.C. 484, and FPMR, 41 CFR 101-45-304-2(c), an explanatory statement of the circumstances of each disposal by negotiation of personal property will be prepared. An outline for the preparation of explanatory statements relative to negotiated sales is provided in FPMR, 41 CFR 101-45.4806. The PDO will prepare 10 copies of each explanatory statement and forward to the Manager, Warehousing and Disposal Programs, NASA Headquarters. NASA HQ will submit the explanatory statements to the Administrator of GSA for review and transmittal by the GSA to the appropriate committees of the Senate and House of Representatives. Copies of the GSA transmittal letters to the committees will be furnished to the Manager, Warehousing and Disposal Programs, NASA Headquarters, and then to the applicable PDO. In the absence of any action by a committee on the proposed negotiated disposal, NASA may consummate the sale on or after 35 days from the date of the GSA letter transmitting the explanatory statement to the committee.

9.9.2. The PDO should prepare and retain a copy of the explanatory statement for all negotiated sales. However, the explanatory statements are not required for the following:

- (1) Disposal of personal property at fixed prices only when prior approval by the Administrator of GSA of the property categories to be sold.
- (2) Negotiated sales at fixed prices, through State agencies for surplus property, to State and local governments including territories, possessions, political subdivisions thereof, or tax-supported agencies therein, that have expressed an interest in the property.
- (3) Disposal of personal property authorized to be made without advertising by any provision of law other than section 203(e) of the Federal Property and Administrative Services Act of 1949, as amended, 40 U.S.C 484.
- (4) Disposal of personal property having a fair market value of \$15,000 or less.

9.9.3. The PDO at each NASA Center and the Jet Propulsion Laboratory will prepare or oversee the preparation, consolidation, and transmittal of the negotiated sales report to the Manager, Warehousing and Disposal Programs, NASA Headquarters, by October 31 of each year. Negative reports are required. An annual report listing and describing any negotiated disposal of NASA-owned surplus personal property having an estimated fair market value of more than \$5,000, other than disposal for which an explanatory statement has been previously submitted to NASA Headquarters, will be prepared on a fiscal year basis. In accordance with FPMR, 41 CFR 101-45-4702, the Manager, Warehousing and Disposal Programs, NASA Headquarters, will prepare a consolidated NASA report for submission to GSA by November 29 of each year.

9.10. Performance Measures

Timeliness of Disposal Processing Metric. The format and instructions for preparing the Disposal Processing Metric is contained in Attachment A of NASA Policy Directive 4300, "NASA Personal Property Disposal Policy."

9.11. Annual Report of Utilization and Disposal of Foreign NASA Personal Property

(RESERVED)

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