



Appendix S: Equipment Maintenance and Monitoring Plan



Private Forest Accord Grant Program Equipment Maintenance and Monitoring Plan

The PFA Grant Program is funded by public resources, to ensure responsible use of funds, all projects proposing equipment purchases must develop a five-year Maintenance and Monitoring Plan (M&MP). This M&MP, outlined in detail here, ensures equipment remains in optimal working order, maximizes lifespan, and continues to serve its intended purpose for five years following project completion. The Grantee shall retain the equipment.

Per this Maintenance and Monitoring Plan, Equipment means “Tangible personal property (including information technology systems) having a useful life of more than one year and a per-unit acquisition cost which equals or exceeds \$5,000.”

The M&MP template must meet at a minimum the following requirements:

1. Equipment Description:
 - a. Provide a detailed description of the equipment, including manufacturer, model number, serial number, and any other relevant information.
2. Preventative Maintenance Schedule:
 - a. An adequate maintenance procedure must be developed to keep the property in good condition.
 - b. Outline a comprehensive preventative maintenance schedule that includes:
 - i. Frequency of inspections and servicing.
 - ii. Specific tasks to be performed during each maintenance activity (e.g., oil changes, filter replacements, software updates).
 - iii. Qualified personnel responsible for conducting maintenance.
3. Monitoring Procedures:
 - a. Detail the procedures for monitoring equipment performance. This may include:
 - i. Data collection methods (e.g., sensor readings, performance logs).
 - ii. Parameters to be monitored (e.g., uptime, efficiency, error rates).
 - iii. Frequency of data collection and reporting.
4. Replacement Criteria:
 - a. Define the criteria for determining when equipment needs replacement. This could include:
 - i. Age of equipment.
 - ii. Recurring maintenance costs exceeding a certain threshold.
 - iii. Significant performance degradation.
 - iv. Obsolescence due to technological advancements.
5. Rental fee structure (if applicable):
 - a. No profit should be made from renting this equipment to another entity.
 - i. Rental fees may only be applied to cover the cost of operations and maintenance of the equipment.
 - b. The Grantee is the sole responsible party for the equipment and any damage caused to the equipment regardless of the renter.
6. Long-term use
 - a. Define the long-term use of the equipment after the 5 years M&MP.

- b. A control system must be developed to ensure adequate safeguards to prevent loss, damage, or theft of the property. Any loss, damage, or theft must be investigated.
7. Recordkeeping:
- a. Specify the process for recording all maintenance activities, monitoring data, and replacement decisions. This may include:
 - i. Use of a dedicated logbook or electronic database.
 - ii. Retention period for maintenance records.
 - b. Property records must be maintained for at least 5 years, that include a description of the property, a serial number or other identification number, the source of funding for the property, who holds title, the acquisition date, and cost of the property, percentage of State participation in the project costs for the State award under which the property was acquired, the location, use and condition of the property, and any ultimate disposition data including the date of disposal and sale price of the property after the 5 year maintenance and monitoring period.
 - c. A physical inventory of the property must be taken and the results reconciled with the property records at least once every two years.

Record Retention, Audits, and M&MP Review

Record Retention: The Grantee shall maintain all M&MP records, including maintenance activities, monitoring data, and replacement decisions, for a minimum of five years. These records shall be available for audit and inspection by the Oregon Department of Fish and Wildlife (ODFW) upon request.

Equipment Disposition: Equipment purchased with grant funds must remain with the Grantee or a Department-approved entity for a minimum of five years. Should the Grantee wish to sell the equipment before the five-year period ends, written notification and prior approval from ODFW are mandatory. ODFW reserves sole discretion regarding such sale approvals.

M&MP Review and Updates: ODFW retains the right to review the M&MP at any time, especially upon significant changes to the equipment or its operating environment. The Grantee shall be responsible for proposing any necessary updates to the M&MP for ODFW's approval.