A decorative background on the left side of the slide featuring a cluster of colorful paper figures in various colors (yellow, pink, blue, green, orange, purple, grey) with their arms raised, suggesting a group or community.

***Practical Solutions
for Managing
SCCOE Fixed Assets***



Sheetal Mistry



Santa Clara County  Office of Education

Sheetal Mistry

Connectedness/Adaptability/Input/Relator/Ideation

Asset/Inventory Workflow

Champions for Leadership

May 31, 2018

Goals

Professional Goals

- To learn more about SCCOE as an organization, to challenge process, practice philosophy and the people
- To establish professional relationships with colleagues outside my normal sphere of contacts



Why this Project?

- To embed organizational effectiveness and efficiency into the Fixed Asset/Inventory workflow using the resources available (QCC)
- Custodians of public funding
- Responsibility of accountability and transparency

Goals

Project Goals

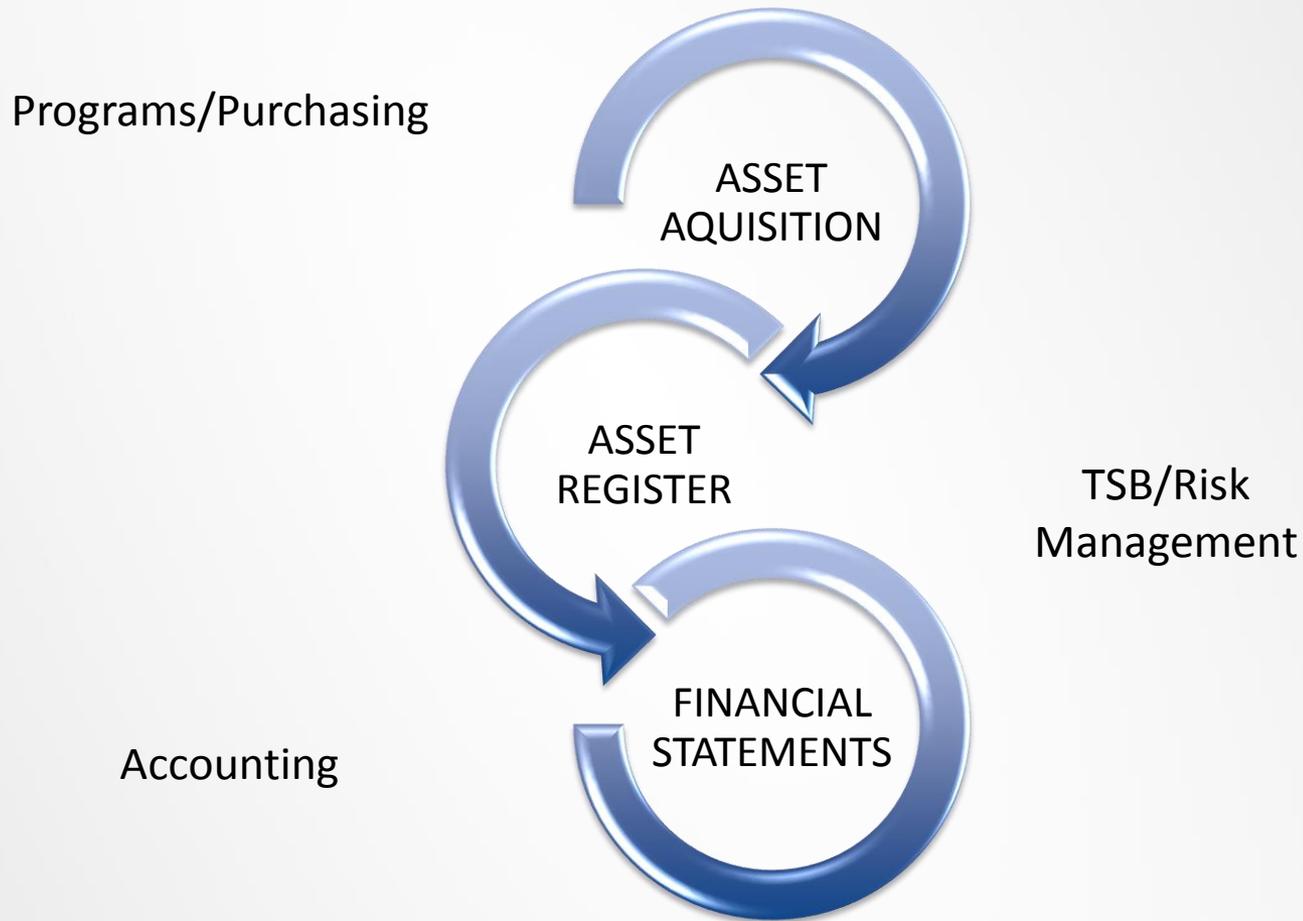
- “Encourage employees and others to better discharge their responsibilities in the care and use of the LEA’s equipment”
- “Enable administrators to account for and control all assets under their care”

CSAM – California Schools Accounting Manual

Stakeholders

- Programs
- Purchasing & Receiving
- TSB
- Risk Management
- Accounting

Ideal Standard



Challenges

Organizational

- Lack of understanding / responsibility / accountability
- No written procedures
- Lack of communication and collaborative working

System

- Multiple location codes
- Incomplete information
- Obsolete information

Learning Outcomes

- Flexibility of QCC

95 record fields to customize register to our requirements

Purchase Order Module interface to Asset Register



Recommendations

- Implement and communicate written procedures
- Clean up the data
- Define the parameters & standardize location codes
- Use Purchase Order interface to capture data on delivery
- Continuous process - Nest Forms/Sortly
- Formal annual inventory



Thanks

- Niti Sharma/Ki Lam – Nominator/Supervisor
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- Govindeep Walia/Paul Finucane
- CFL Cohort 2018

