Practical Solutions for Managing SCCOE Fixed Assets

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Connectedness/Adaptability/Input/Relator/Ideation

Asset/Inventory Workflow

Champions for Leadership
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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

Programs/Purchasing

ASSET AQUISITION

ASSET REGISTER

FINANCIAL STATEMENTS

TSB/Risk Management

Accounting
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

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