



August 1, 2005

MEMORANDUM

TO: University of Oregon Survey and User Group Meeting Participants
FROM: Betty Nielsen, Quality Assurance Program
SUBJECT: Equipment Control Survey and User Group Meetings Summary of Results

During the equipment control process review, Quality Assurance received forty-eight survey responses and held five user group meetings with thirty-three participants. We are very pleased with the responses and participation. This memo is to share information gathered from surveys and in the user group meetings.

We will be developing a plan of action to address the concerns and recommendations by the end of September. We will also be asking for additional participation by users in various implementation teams. Please contact Betty Nielsen by email (Nielsen@uoregon.edu) or phone (346-2817) if you have any questions.

SURVEY RESULTS

Questions	Responses						Total
	Extremely Satisfied	Usually Satisfied	Neutral	Usually Dissatisfied	Extremely Dissatisfied	No Answer	
#1 - How do you rate your overall satisfaction with the business affairs office's ability to clearly communicate the property control processes?	7	26	10	3	0	2	48
#2 - How do you rate the timeliness and responsiveness of the Business Affairs Office to your equipment control requests and needs?	20	18	6	1	0	3	48
#3 - How do you rate your level of satisfaction with the current process for property control?	7	24	6	7	3	1	48
#4 - How satisfied are you with the current process for disposing of equipment that is no longer needed by your department or unit?	6	14	12	11	3	2	48
#5 - How do you rate the process for notifying the Business Affairs Office when the location of equipment changes?	5	9	26	4	0	4	48
#6 - How satisfied are you with the process for accepting and recording donated equipment?	3	5	33	2	0	5	48
#7 - How do you rate the information provided on the Business Affairs Office website for equipment control?	5	25	13	2	0	3	48

USER GROUP MEETINGS:

The following statements were made regarding current practices, procedures or elements of the Equipment/Property Control process that should not change.

- The \$5,000 capitalization threshold is appropriate.
- The capital asset process works well in Banner.
- The Business Affairs website contains lots of information and examples.
- The building and equipment reserve meeting was very helpful.
- The capital asset process works well (forms, process, etc.)
- Recycle staff are very responsive.
- ROSE works great.
- Decentralization is working, but property control should be centralized.
- Property control working much better prior to personnel cuts.
- Internal department tracking systems work well to track minor equipment inventory.
- Surplus list is good – could add more information to website.
- Computer Harvest works well.

We received the following feedback when we asked what the barriers and problems were in the current equipment/property control model and what the recommendations for improvement were.

	What are the barriers and problems you have encountered?	What are your recommendations for improvement?
Forms:	<ul style="list-style-type: none">• Lack of knowing what forms are available.• Forms that use carbon paper and need to be completed on the typewriter or by hand.• Too much time is needed to complete and process the forms.	<ul style="list-style-type: none">• Improve communications for forms available.• Develop on-line forms, combine present forms, and simplify forms as much as possible.
Communication:	<ul style="list-style-type: none">• Department communication – items moving between offices without a record (internally and externally). Need to notify property person when something moves.• Who to call – not knowing who to communicate with regarding property control.• Lack of inter-department communication to help departmental property control person do their job.• Create and update a list-serve so new employees and others can be added.• Duplication of efforts – computing center list and BAO list – needs campus wide coordination.• Lack of answers to questions (FAQs)	<ul style="list-style-type: none">• Develop trigger for loan equipment form with renewal notification.• Develop an efficient method for notification of changes as they occur to departments (risk, facilities, property control, and within the department). Develop on-line equipment transfer and approval process.• Maintain a property control list serve.

What are the barriers and problems you have encountered?

Training:

- Lack of training and information (how to's)
- Lack of knowledge of process – especially for new employees.

Capital Equipment:

- Tracking in Banner for items built with components is frustrating. Departments develop separate data bases because they cannot rely on Banner.
- Locating components of a main piece of equipment is difficult.
- Component – departments are unclear from communication about when to expense or when to capitalize assets built with component parts. How do you capitalize when item is built?
- Process for adding to the value of an asset over multiple fiscal years is unclear.
- Process for capitalizing items that have been pre-paid is unclear.
- Too much time is needed to identify, mark and track equipment. Process is overly cumbersome.
- Process for leased items verification at year-end is confusing.
- Invoice documentation requirements need to be clearer.
- Bar-coding not implemented at UO.
- Current inventory tags are not durable and do not last.
- Departments currently receive blocks of inventory numbers. There are currently duplicate assets assigned to inventory numbers in Banner.
- Process for accepting gifted equipment not clear.
- When something is capitalized, knowing what account code to use is difficult to determine.

What are your recommendations for improvement?

- Develop on-line training modules for all areas of property control. Develop an initial (new user) training course. Create networking opportunities.
- Improve the methodology for getting, transferring, and/or exchanging copiers.
- Improve training for invoice documentation requirements.
- Develop bar coding for tracking capital assets.
- Don't put barcode labels on doors, keep master list.
- Provide departments with new tags for capitalized equipment.
- Automate inventory number assignment.
- Create an account code cheat sheet.

What are the barriers and problems you have encountered?

Banner:

- Ability to track minor equipment and capital asset information in Banner is limited.
- Shadow systems duplicate what's in Banner. For example, enter location change in departmental shadow system and then send notice to Property Control to update in Banner as well.
- Process for providing central property control staff information for document text is cumbersome.

Website:

- Not knowing when website is updated or changed.
- Website instructions for property control processes are not clear.

Minor Equipment:

- Tracking minor equipment – should it be consolidated and standardized?
- Tracking and removing software is difficult.
- Need tracking system for minor equipment (internal/department specific). Have record of purchase but no means of tracking.
- Estimated value of minor equipment and necessary software can push purchase price over capitalization threshold.
- Minor Equipment – office staff don't often know of faculty purchases or transfer of minor equipment. It is hard to maintain.

What are your recommendations for improvement?

- Allow access to Banner in order to view more information and create more detailed reports.
- Allow Departments to record additional information in Banner instead of Property Control (for example serial numbers and descriptions).
- Review modification to Banner with upcoming upgrade.
- Provide departmental access to Banner fixed asset module.
- Notify campus users when updates are made.
- Expand website to include more specific steps in the property control processes.
- Post frequently asked questions (FAQ) on the property control website.
- Add additional input areas in Banner for minor equipment as a mechanism to replace internal tracking for department.
- Expand descriptions on the minor equipment annual report – descriptions not always clear as to what the item is. Perhaps include original document number.

What are the barriers and problems you have encountered?

Surplus:

- Disposal – amount of paperwork is too much (prefer to just “junk” the items). Process is tedious.
- Information required to provide to surplus is too detailed, for example, have to specify/determine if equipment is working - not enough staff/time to handle.
- Lag time between identification for disposal and pick up.
- Lack of storage for surplus items – campus wide storage shortage. Buildings have become “dumping zone” for equipment.
- Process for how to dispose of assets is unclear.
- Requirements for disposal of hazardous materials (microwaves, chemicals, light bulbs) are cumbersome.
- Process is unclear for what to do when surplus items are not accepted.
- Difficult to identify what is surplus, salvage, usable, garbage, scrap.
- Auxiliaries do their own sales – rest of campus different.
- Myths about who is responsible for what – pickups, forms, surplus warehouse, etc.
- Unclear how to record disposal of components when only pieces are turned in.
- Wish to sell to faculty vs. Salem.
- Inability to donate to 4J, etc.
- Old computers – why do they have to go on surplus list? Need process for items that have no resale value.

What are your recommendations for improvement?

- Maintain campus wide storage. Maintain a central furniture warehouse/recycle center for used items. Surplus furniture warehouse – where can walk – in.
- Model OSU’s Property control/surplus. Look at shared resources, even for surplus and disposal.
- Donate to 4J schools and other non-profit organizations.
- Continue ability to raid computer parts (harvest).

What are the barriers and problems you have encountered?

What are your recommendations for improvement?

Other:

- Need definitive answers. For example, can departments pay travel for installation on equipment?
- Not clear what account codes are appropriate to use – better definitions, access to information – EXAMPLES – creates lack of standardization across campus.
- Knowing what you don't know.
- Property Control needs to be ranked higher as a priority. Time is an issue.
- Concern – what happens after Property Control Manager leaves?
- Reporting stolen items is meaningless process – why do it?
- Faculty perception that equipment belongs to them makes it difficult for departmental personnel to track.
- Accessibility to buildings creates increased risk of theft.
- Redefine account codes or establish a commodity code for IT purchased equipment.
- Make the process easier, not more complicated for departments. Develop consistent policies.
- Increased FTE in BAO Property Control.
- Have sample language for faculty that leave re: books, minor equip. etc.