SPRING 2023
PACE Meeting
PMO - 3000

April 18, 2023
Today’s Topics!

Agenda

• New Campus Support Team member
• Welcome New DPAs!
• FY 22 Year End Metrics
• Audit Updates
• PMO Project Updates
• Excess Labels and Labelling
• Reminders
  • Requisition Approvals
  • Lease Tracking/Tagging
  • Custodian Updates
  • Damaged Property Reporting
• Guidelines – Major Moves & Projects
• B23/B25 Inventory Updates
• Capital Cost Transfer
• Upcoming Training Dates
Welcome – Christine Aguilar

- Christine Aguilar, joined PMO on January 25th.
- She is filling the posted Property Programs Administrator position and joining our campus support team.
- She has been with Stanford for 18+ years and brings to PMO a wealth of knowledge about the University and the research environment.
- Christine comes to us from the Department of Anthropology, where she has been the Assistant Department Manager.
Welcome New DPAs
February 2023

- Shawn Forzetting
- Angelica Trejo
- Jonathan Clough
- Jonathan Clark
- Sonam Kumari
- Priya Shah
- Blake Hennessy Bottorff
- Kevin Lo
- Yawen Li
- Jeremy Lucky
- Julianne Spitler
- Michelina Pilo
- Wendy Fang
- Elise Pimenta Estanislau
- Judy Womack
METRICS REPORTING for FY2022
PROPERTY MANAGEMENT OFFICE
Purchase Acquisitions

Purchases of capital equipment remain robust and are forecast to increase to pre-pandemic levels as major projects (both sponsored and internal) regain momentum.
The ‘uptick’ in postings in FY21 reflect the reopening of campus, allowing for the tagging and reconciliation of the backlog of receipts that arrived during COVID. Some residual of this continued into FY22 but has returned to a more ‘normal’ cycle in the current period.
Requisitions – Error Rates

• 3,555 End Route approvals:
  • 1,771 Purchase requisitions
  • 1,784 Pcard transactions

• 13.5% error rate:
  • Of the 239 errors:
    • 103 lacked screening 43.1%
    • 93 had ET errors 38.9%
    • 18 were late purchases 7.5%
    • 25 had other errors 10.5%

<table>
<thead>
<tr>
<th>Month</th>
<th>Errors</th>
<th>Transactions</th>
<th>Error Rate</th>
</tr>
</thead>
<tbody>
<tr>
<td>SEP</td>
<td>20</td>
<td>154</td>
<td>13.0%</td>
</tr>
<tr>
<td>OCT</td>
<td>14</td>
<td>150</td>
<td>9.3%</td>
</tr>
<tr>
<td>NOV</td>
<td>17</td>
<td>141</td>
<td>12.1%</td>
</tr>
<tr>
<td>DEC</td>
<td>0</td>
<td>106</td>
<td>0.0%</td>
</tr>
<tr>
<td>JAN</td>
<td>12</td>
<td>137</td>
<td>8.8%</td>
</tr>
<tr>
<td>FEB</td>
<td>13</td>
<td>121</td>
<td>10.7%</td>
</tr>
<tr>
<td>MAR</td>
<td>18</td>
<td>152</td>
<td>11.8%</td>
</tr>
<tr>
<td>APR</td>
<td>27</td>
<td>167</td>
<td>16.2%</td>
</tr>
<tr>
<td>MAY</td>
<td>36</td>
<td>160</td>
<td>22.5%</td>
</tr>
<tr>
<td>JUN</td>
<td>32</td>
<td>174</td>
<td>18.4%</td>
</tr>
<tr>
<td>JUL</td>
<td>24</td>
<td>135</td>
<td>17.8%</td>
</tr>
<tr>
<td>AUG</td>
<td>26</td>
<td>174</td>
<td>14.9%</td>
</tr>
<tr>
<td><strong>ALL</strong></td>
<td><strong>239</strong></td>
<td><strong>1771</strong></td>
<td><strong>13.5%</strong></td>
</tr>
</tbody>
</table>
Record Creation

3,185 new Sunflower records were created in FY22

65.8 days was the average time for record creation after receipt

This is an improvement from the average 86.4 in FY21, but still not close to the pre-pandemic average of 45 days!
Capital Cost Transfers

Since going live in May 2022, the new SPARC application has been used to process over 180 purchase order modifications involving nearly $10M in cost transfers.
Excess Activity - SPARC

Totals:
- Requests: 5,803
- Items: 20,230
- Tagged Items: 2,240
Excess Activity - SPARC

Computers and peripheral computer equipment continue to be the largest percentage of items at 19% each (38% of the total).

Furniture is no longer excessed through the SPARC application and is now being monitored separately.

Supplies are no longer collected. We encourage using the Reuse application to find homes for office and lab supplies.
Excess Activity - SPARC

<table>
<thead>
<tr>
<th>QUAD</th>
<th>Primary Entity</th>
</tr>
</thead>
<tbody>
<tr>
<td>07</td>
<td>SoM</td>
</tr>
<tr>
<td>08</td>
<td>GSB</td>
</tr>
<tr>
<td>04</td>
<td>SoEng / DoR</td>
</tr>
<tr>
<td>02</td>
<td>SoEng</td>
</tr>
<tr>
<td>01</td>
<td>Main Quad</td>
</tr>
<tr>
<td>14</td>
<td>UIT / EH&amp;S</td>
</tr>
<tr>
<td>70</td>
<td>SRWC</td>
</tr>
<tr>
<td>90</td>
<td>SLAC</td>
</tr>
</tbody>
</table>
Reutilization Program

- Number of items salvaged: 5,844 (Increase over FY21: +46.5%)
- Number of items reused: 1,950 (Increase: +235%)
- Disposal Cost Avoided: $217,113 (Increase: +25.9%)
- Replacement Cost Avoided: $347,391 (Increase: +212%)
- Landfill Diversion: 271,162 pounds (135.58 tons) (Increase: +85.3%)
Audit Updates

PWC (Uniform Guidance)
- All requested data submitted
- Site visit inspections performed
- Waiting for any additional questions

COSO (Internal Risk Management)
- All requested data submitted
- Waiting for any additional questions

Property Tax – Alameda and Monterey Counties
- Waiting for initial commencement
Major Projects
- SPARC

- Several enhancements to Excess
  - Ability to attach multiple photos or documents (by both originator or PMO)
  - Serial number field for non-tagged equipment (now required for data devices)

- New link to GovDeals to review equipment or vehicles offered for sale
  - Staff seeking computers, monitors, or furniture can still reach out directly
  - Alex.perez@stanford.edu, jimmy.baca@stanford.edu, swmages@stanford.edu

- New Application to monitor equipment on sponsored projects
  - Internal for PMO use to facilitate reporting and compliance
  - Initial business requirements outlined, and general functionality developed
  - Anticipated for testing in May, go-live in June
Major Projects – OBI Property Dashboard

• New Property Subject Area completed
• Comprehensive Property Report
  • Combines functionality of both current 286 and 296 reports
  • Ability to limit to only Sunflower or only Oracle Financial info if desired
  • Numerous new output values and search prompts
• Replacements for Unmatched (288), Mass Additions (287), Depreciation Forecast (294), and Excess (295) are in development
• New Cost Clearing report for FA/GL reconciliations
OBI Demonstration

Comprehensive Property Report
  Structure
  Functionality
  New Features
Excess Equipment Preparation

All capital or non-capital excess assets should be:

- **Staged** and ready for collection
- **Tagged** – *Orange Excess label* is affixed to each item and clearly visible to collections team or 3rd party pick-up vendor
- **Decontamination** – Some items (such as lab equipment) may need to be decontaminated prior to pick-up. Contact PSSI for assistance with decontamination procedure.
- **Computer Data Deleted** – All computer equipment that has non-public Stanford data needs to be wiped of all data before request for pick-up. See UIT Link for details or contact your local CRC team for instructions.

**Pick Up Request Information** – Be sure to include your PSSI or UG2 work request included in your SPARC Excess request

*Contact your Campus Support Team member if you have any questions*
Excess Equipment Reminders (cont.)

**Determine if SPARC or SUNFLOWER Excess**
- Assets (capital and non) physically being picked up for excess by SPS
- Assets (capital and non) being removed by 3rd party

**Disposals Special Handling**
- Lab equipment
- Freezers, Refrigerators, Chillers
- Tissue culture hoods
- Pumps
- Vehicles
- Off-Site

**Non-Tagged Excess (non-capital)**
- Desktop and laptop computers
- Smart phones
# Excess Reference and Informational Links

## PMO Surplus Property / Disposals

## PSSI
- https://lbre.stanford.edu/pssistanford-recycling

## SPARC Excess User Guide

## Surplus/ReUse Contact
- Alex.perez@stanford.edu, jimmy.baca@stanford.edu, swmagee@stanford.edu
## Staff Purchases

In the event a staff person wishes to purchase their used computer or phone, the following specific steps are needed to accomplish this:

<table>
<thead>
<tr>
<th>Device User</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>- Obtains a guesstimate of the device’s market value (<a href="https://www.gazelle.com/">https://www.gazelle.com/</a> or <a href="https://ebay.com">https://ebay.com</a> are possible sources)</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Device User</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>- Contacts Department Property Administrator (DPA) to request initiation of purchase</td>
<td></td>
</tr>
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</table>

<table>
<thead>
<tr>
<th>DPA</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>- Obtains approvals to buy from Department Manager and/or Chair</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>DPA</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>- Once approval has been granted, DPA contacts Surplus Property Sales (SPS) to obtain price quote (If purchased within one year, Dept. to provide purchasing information. Phone will be sold for purchase price or fair market value, whichever is greater) If price is acceptable to buyer, DPA generates SPARC request for sale.</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Surplus Property Sales (SPS)</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>- Sends invoice, buyer pays invoice</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Department</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>- Issues an Order-IT request to submit a Cancel-Order, requesting release of the device to a personal account.</td>
<td></td>
</tr>
</tbody>
</table>

**Once the Order-IT is processed**, it is turned over to Mobile Device Services, who will release financial responsibility to the user. Once the transfer is authorized with the new carrier, the user receives emailed instructions on how to assume liability of the phone number, if desired. Instructions are also provided on how to contact the new carrier directly.

<table>
<thead>
<tr>
<th>Device User</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>- Removes iCloud or Google login (unlocks device/phone)</td>
<td></td>
</tr>
<tr>
<td>- Opens SNOW (help) ticket to release device from MDM &amp; ASM</td>
<td></td>
</tr>
<tr>
<td>- Performs remote reset/device wipe to ensure all SU is data removed</td>
<td></td>
</tr>
<tr>
<td>- User is now in possession of phone</td>
<td></td>
</tr>
</tbody>
</table>
SPARC Tag Order Requests

- All asset labels are available via the SPARC website
- Site includes ordering instruction
- On the left-hand column are the links for
  - Create a New Request
  - Look Up Request
  - Tag Maintenance and other information
- Available options include
  - Barcode tag sheet
  - Barcode tag reissue
  - Excess request
  - Component
  - U.S. Government labels
  - Non-Capital overlay
  - Non-Stanford/Loan overlay
  - Donated asset overlay
  - Round Red and Black identity
  - Asset relocation
Requisition Approval Reminders

The approving DPA on a capital requisition assumes responsibility to tag the asset and is the owning department. This includes assets paid by two or more departments.

Related to unmatched POs, you will serve as the point of contact to identify & communicate if the tagging is delegated to another DPA and will be owned by another department.

In the event you are approving a requisition on behalf, please include a detailed statement in the Notes section with the screening # prior to approval.

RE: Action Required: Purchase Requisition
Requisition Approval Reminders

**Fleet Garage**
- Fleet garage for tagging all vehicle purchases
- New Vehicle Fleet Entry form provided by Fleet
- DPA creates Sunflower record

**University IT (UIT) Servers & Related Capital Equipment**
- Installed at the Stanford Research Computing Facility (SRCF) or Forsythe Hall
-UIT will identify and tag the assets
- Tagging Worksheet provided by UIT
- DPA creates Sunflower record
Equipment Leases

**Leased equipment (acq. $5,000+ and 1 year or more) need to be**
- Identified
- Tagged
- Recorded in SFA
- Tracked/Monitored for return

**Notify PMO upon return for record retirement**
- Or
- If there is a lease extension of the term

**Do not wait for inventory!**

**Leases discussed on a monthly basis**
B23 Physical Inventory

School of Medicine
   Initial scan completed
   83% find rate!!!!!!
   Now completing reconciliation
June 9, 2023 end of SoM recon

Remaining Departments to be scanned
Residential Dining Enterprises
Biology
Graduate School of Business
Education
Public Safety
Hoover Institute
Physical Inventory Updates

- B23 Inventory Close
  August 31, 2023
- B25 September 2023 –
  August 2025
  - Schedule notifications and
    Calendar invitations sent to DPAs
  - Additional internal
    planning meetings being scheduled
Preparing for Moves and Major Projects

• PMO is working on preparing additional guidance "checklist" for DPA reference

• General recommendations
  • Maintain strong communication with local area project/facilities managers
  • Be familiar with general timelines, key deadlines, and key participants for major projects or equipment relocations
  • Do a walk-thru of the areas that will be involved
  • Obtain confirmation of:
    • Areas that will be vacated -- remember to check storage areas/cabinets for hidden items
    • Equipment currently located and/or listed as being in the areas that will be vacated, and their custodian(s)
      • What will be relocated within Stanford; what may need external transfer
      • What may be excess and need a SPARC excess request
      • What may be transferred to another custodian/area
  • Destination areas
    • Use a marking strategy to identify what will go where
    • Will external assistance be needed for the move? If so; who will arrange?
    • Updated the asset records
Custodian Updates

Maintain current Custodian(PI) information in Sunflower

Update records in real time custodians leave the department, are no longer at Stanford or have retired

Periodically run the Oracle 286 report to review & confirm custodian information

Your Campus Support Team member can assist with mass updates. Please reach out.

As a best practice, DPAs should not be listed as a custodian

Your support helps with inventory, transfers, disposals and ongoing efforts with Custodian Cleanup projects
Capital Cost Transfers (CCT) News and Updates

- Resource Page
  - ora.stanford.edu >> Property Management Office >> capital cost transfers
- Capital template mailman to be retired, as of today
- Training Available
  - Self Paced Introduction - PMO-5010
  - Additional 1:1 with your PPM
- Additional Learning Resources
  - Presentation slides
  - User Guides
  - “How To” Instructions
Damaged or Lost Equipment

Capital equipment must be reported to Risk Management should also be reported to PMO

Examples

- Damaged
- Stolen
- Lost

PMO can assist with reports, record retirement etc...

SPARC excess requests required to be reimbursed by the Office of Risk Management
Upcoming Training Opportunities

**PMO-4000**
Overview and Demo OBI
Consolidated Report TBD, Summer 2023

**PMO-1000**
DPA Certification class two required sessions, June 2023

**PMO-5010**
Self-paced introduction to creating a Capital Cost Transfer in SPARC.

**PMO-2000**
DPA review and refresher class, single session, July 2023.
Stan Dunn Will Be Retiring June 2023
Thank You for Attending!

Next PACE Meeting October 2023