

# 13 QUESTIONS

## *To Ask On Your Asset Inventory System RFP*

*Asking these questions on your Request for Proposal will ensure that you choose the right inventory management system for your district.*

### 1 *Is the solution provided designed specifically for the Kindergarten through Twelfth grade educational environment?*

**WHY YOU WANT TO KNOW:** A company familiar with K-12 understands your needs and challenges and will offer you features and functionality specifically designed to match the requirements of managing assets across buildings, departments, classrooms, staff members, and students. Vendors should also understand administrative oversight needs, providing you with reporting capabilities across any and all locations so you can plan and budget for the future. Because they understand you have limited staff resources, they will offer specific technology to automate and improve processes to make it easy for your staff to perform daily tasks.

### 2 *What do asset inventory records look like? How do we know where each item currently is, or has historically been?*

**WHY YOU WANT TO KNOW:** Detailed asset inventory records will be able to show you the asset's entire lifecycle. Anybody at the district should be able to look at the asset record and see what it is, where it is, how it was funded, what status it is in (Is it in use? Broken? Disposed? Available for use?), and where it has been in the past. From the moment that asset is added to the system, every transfer, assignment, and audit of individual assets is recorded. The district should have complete transparency and oversight of its assets, and the confidence that the data is accurate and the application's users are following procedures.

*“From the moment the asset is added to the system, every transfer, assignment, and audit of individual assets is recorded.”*

### 3 *How do I add newly purchased assets to the application?*

**WHY YOU WANT TO KNOW:** The more ways a system allows your departments and campuses to add new inventory, the easier it will be on your staff to integrate the process into their daily responsibilities. Whether it's through an import from a spreadsheet provided by your vendor, an integration with your purchasing or fixed asset system, or individually scanning assets at the district level, warehouse, or building location, a system that provides multiple options offers your staff flexibility and ease of use.

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**4** *Can I customize reports by device, location, funding, and/or custom fields with Excel export options?*

**WHY YOU WANT TO KNOW:** The ability to customize reports will give you complete flexibility to see your current inventory, as well as what the future looks like so you can plan and budget accordingly. Easy-to-use filtering options make it simple for both the district and the campus level to see specific asset record details, like the model, manufacturer, purchase order, price, building location, warranty date, or operating system. Exporting these details to Excel enables you to further customize the communication of this information to other individuals.

**5** *Does the solution allow for district, building, and department level asset management oversight?*

**WHY YOU WANT TO KNOW:** An inventory management system that allows oversight at all levels increases accountability and efficiency, providing more real-time information to track daily activity. The district will be able to control who scans inventory and for what purpose (transfer, assignment, audit), and where resources are located. An ideal system is capable of supporting the inventory needs of multiple departments, as well as providing a centralized view that allows districts to plan for the future accordingly and ensure equity across buildings.

*“An ideal system is capable of supporting the inventory needs of multiple departments, as well as providing a centralized view that allows districts to plan for the future.”*

**6** *How is inventory tracked to students, staff, rooms, and buildings using a handheld scanner and barcodes placed on each asset?*

**WHY YOU WANT TO KNOW:** Uniquely barcode labeling and scanning assets in an inventory system will enable approved users to easily automate an otherwise time-consuming, manual process. This functionality will give users an accurate representation of how assets are being utilized. Assigning inventory to students and staff is made more efficient by having access to nightly updates of the individual's current location from the student information system with options for inventory to transfer with that student automatically.

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**7** *Is there a way to track student damages, fees for equipment's use, and payments received?*

**WHY YOU WANT TO KNOW:**

This functionality allows the campuses to create a connection between the devices issued to students and the district's acceptable use policies. It also provides a comprehensive historical view of all charges issued, payments made, and outstanding obligations to provide clear communication to students and their parents.

**8** *Does the system support both barcode and RFID?*

**WHY YOU WANT TO KNOW:**

A district will want to choose a vendor who is actively investing in solutions that improve the usability and accuracy of your inventory records. Barcodes and RFID offer an automated solution to the challenge of correctly identifying the assignment and location of inventory throughout the school district. This takes a traditionally manual process and provides tools for staff to easily accomplish those tasks in fewer steps with greater speed and precision.

**9** *What is the process to perform an inventory audit of assets?*

**WHY YOU WANT TO KNOW:**

A system that performs audits will give your district an accurate view of inventory location across your schools and allow you to update asset records based on the audit's results. Users following best practices of inventory taking will record every asset in real time as they go wall to wall, floor to ceiling, open every box and cabinet, and look under every desk with a handheld barcode or RFID scanner. During these audits, you'll also be able to identify inventory that is assigned correctly, currently missing, or has moved building locations.

**10** *How are assets transferred between buildings?*

**WHY YOU WANT TO KNOW:** The more ways a system allows your departments and campuses to transfer inventory, the easier it will be on your staff to integrate the process into their daily responsibilities. Whether it's through a campus initiated transfer to a warehouse or another campus, an inventory system should provide staff the flexibility to relocate tagged or untagged items for the purpose of disposal, auction, recycling, or surplus. Additional approval processes can be added for special-funded items, as well as principal sign off to provide transparency and historical documentation. Warehouse staff should be able to easily schedule drivers for pick-up/delivery and record the details of inventory on pallets, racks, or bins. The district office may need to quickly move inventory without scanning from one campus to another in times of technology refresh, campus construction, or school closings.

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## 11

*Is it possible to track untagged items like adaptors, batteries, cords, remotes, and protective cases?*

**WHY YOU WANT TO KNOW:** A system that lets you track accessories allows for greater oversight and individual accountability. Some systems let you associate these untagged items with the actual assets (like a power cord with a laptop). The value of these items is communicated to students and teachers with receipts to reduce long-term costs due to loss.

*“Evaluate the cost benefit associated with automating manual processes, like duplicate data entry.”*

## 12

*Is it possible to group assets together like a mobile charging cart and 30 laptops for faster transfer and assignment?*

**WHY YOU WANT TO KNOW:** If the system allows for grouping of assets, you'll be able to easily move devices as a unit, which reduces the work required to ensure the accuracy of where devices are located and assigned. Checking out a 30-unit laptop cart to a teacher is as simple as a single scan.

## 13

*What other types of system integrations can be offered to reduce manual data entry and increase information transparency across our assets?*

**WHY YOU WANT TO KNOW:** It's important to evaluate the cost benefit associated with automating manual processes, like duplicate data entry or side-by-side comparisons of disparate systems. There are opportunities to increase district and school level staff access to real-time inventory information simply by interfacing systems like your purchasing, fixed asset, mobile device management, help desk, cash management, and network management that may all hold valuable asset data. Data like purchase history, repair logs, and device specifications can be sent to the inventory management system. Additionally, asset details like tag and serial number, location, assignment, status, or student lost/damaged obligations can be sent from the inventory management system. This offers districts multiple opportunities for system integrations to increase the speed and accuracy of analysis, planning, and budgeting.