

# PHYSICAL INVENTORY SERVICES:

## *The Search for Technology Assets Across 13 School Buildings in 5 Days*

### INTRODUCTION

Prior to implementing an automated inventory management solution for their district, staff at Lockhart Independent School District, located about 30 minutes Southeast of Austin, TX, had a very limited snapshot of assets the district owned. Their “tool” for managing inventory was one PDF file with 7,000 asset line items, which only two people in the district had access to. This left those handling technology on a day-to-day basis (coordinators, principals, etc.) completely on their own and cut off from the district’s inventory data.

Additionally, the inventory data tracked was not consistently recorded accurately, making the data even less reliable for reporting, and therefore less useful for staff to plan. There was a loosely followed rule to track any item valued over \$500 which resulted in an inventory listing that included everything from the expected refrigerators and computers to the unnecessary filing cabinets and hole punches.

### CHALLENGE

The district’s inventory loss rates were high—or at least estimated as high, because no one could track exactly what was lost versus what simply moved to another campus or was being repaired.

Creating the urgency for change were two major developments. First, the district was undergoing a major renovation project that would result in an entire high school campus being demolished and rebuilt.

It would be important to get an accurate inventory prior to the big move to reduce potential loss. Secondly, the district was on the hunt for a new Executive Director of Technology. The hiring committee learned quickly that candidates needed to see what the technology framework was like at Lockhart ISD and unfortunately, nobody had a true picture of what their technology inventory consisted of from building to building or how old items were.

### SOLUTION

Michelle Wylie was an accountant at Lockhart ISD during the district’s switch to an automated inventory management system (she now serves as the district’s CFO). She and her team knew that addressing their inventory challenges would be a major undertaking, and not one they could feasibly manage on their own given the strict timelines of impending school renovations and equipment purchase plans for the 2015-2016 school year.

After researching options for inventory management systems, the district selected Hayes Software Systems’ TIPWeb-IT application as the tool to help them with their needs—they were eager to give the technology mentors at each campus (those who work with teachers to integrate technology into lessons plans) access to their inventory data.

### LOCKHART ISD

TX	Lockhart, Texas
13	Campuses
5,300	Total enrollment

### SOLUTION

- District-Wide Physical Inventory
- Client since 2005

### PHYSICAL INVENTORY PROCESS

	Six Hayes staff members over five days
	12 hours a day spent performing the inventory
	3,485 assets were found

# PHYSICAL INVENTORY SERVICES

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One of the requirements of the newly selected system was to provide inventory access for all designated staff to perform their daily tasks right from their laptop, tablet, or phone. However the question of how to start when the current inventory data was so unreliable remained a concern. "We knew that if we didn't clean up our data, then the rest of our investment wouldn't really give us what we wanted and needed," said Wylie.

Learning that Hayes also offered physical inventory services to help school districts create the baseline inventory Lockhart ISD needed for their software implementation was a huge relief. "We wanted to ensure the data we put in the system was accurate, and we knew the only way to do that with our short timeline was to enlist some help," said Wylie. "To do it ourselves would have taken hundreds of man hours that we didn't have. When we did the math of what it would take to pay our employees for those extra hours, it was a no-brainer to use Hayes instead."

## THE PROCESS

The Hayes services team supported Wylie and her staff every step of the way. As part of the pre-implementation process, Hayes conducted a business process analysis which helped to identify organizational challenges, and then provided Lockhart ISD with a list of customized recommendations in order to prepare the district for the inventory taking process.

The next step was to identify and train staff on exactly which assets were necessary to track. To do this, they approached the implementation project with a "first things first" mentality, which for them meant focusing their attention on getting the most important items into the inventory system immediately.

For Wylie's team, it was important to put processes in place to track their technology assets first because laptops were going missing. They later chose to add other high value items, like microscopes and medical equipment.

The district also actively communicated their goals and progress to their teachers and staff, letting them know which days the Hayes team would be on their campus to take a physical inventory of assets.

"We initially thought we would need to stay with Hayes to answer questions and ensure everything was done correctly as they took inventory – it's what we had to do with other companies in the past. So, we assigned one Lockhart ISD staff member to each of Hayes' two-person teams to accompany them throughout the campuses. That lasted about two hours. They were so efficient and moving so quickly, that we were really just in their way," said Wylie.

The physical inventory project was performed during the school day with six Hayes staff over five days working about 12 hours a day to find 3,485 assets. The decision to take inventory during the school day helped reduce the number of items not on campus (when inventories are performed outside of school hours, it's common for teachers to take their laptops home with them to work for the evening, and so those items are missed). The Lockhart ISD technology mentors at each campus ensured that teachers were prepared for visitors to their classrooms and requested storage cabinets be open so that when the Hayes inventory team came to their room, there was minimal interruption for teachers and students.

"Everything just went so smoothly. Hayes just knows how to do this. They are very professional, and they don't mess around," said Wylie. "We entertained the idea of taking the inventory ourselves for a long time, and I am so glad we didn't."

## COMPANY PROFILE

By specializing in K-12 inventory control, Hayes Software Systems delivers solutions that meet the unique needs of your schools and community.

By incorporating respected methodologies with the unique needs of education professionals for over 29 years, Hayes helps over 7,000 schools across 39 states implement asset and instructional material management solutions.

Every member of our team is committed to your success because when you succeed, your students succeed.



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