# Enterprise Asset Services, Inc.

Fixed Asset Inventory

Services Proposal

For

Riley County USD 378

September 18, 2013

# |Asset|Services|

# Contents

# 1. Introduction

## *Importance*

In today's environment, school districts have a great responsibility to use their allotted budgets wisely. Capital assets/equipment is a major portion of expenses that school districts need to include in their budgets, therefore having an accurate snapshot of current assets is a necessity. It is vital to ensure the equipment that an organization owns, or has in their custody, is being used as intended. It is also important to know the exact location of that equipment. Accurate asset listings are also important for government reporting requirements and disaster preparedness. By recognizing the need and importance of a thorough and accurate inventory of fixed assets, Riley County USD 378 has already taken the most important step.

Asset Services has performed fixed asset inventories at school districts for over 20 years. By focusing exclusively on fixed assets, Asset Services has gained a reputation for their proven processes and expertise in capital equipment identification.

Asset Services also provides asset valuations, assigning fair market value and replacement cost for each item inventoried. This information is vital for insurance and disaster recovery purposes.

Asset Services takes great pride in operating with the utmost accuracy, while at the same time completing projects with maximum efficiency and expediency. Asset Services' past experience in the education fixed asset arena allows us to perform projects with a minimal amount of assistance required by the client, thereby allowing the client to focus on their primary responsibilities.

Asset Services is confident in its ability to provide a quality end product that Riley County USD 378 will be able to use to ensure their fixed assets are accurately accounted for and being used in the most productive manner.

## *Understanding*

Asset Services understands that Riley County USD 378 (USD 378) desires:

- An accurate fixed asset inventory of all USD 378 facilities using barcode technology.
- A comprehensive valuation of all inventoried assets (replacement cost).

## 2. Project Scope

### *Physical Inventory*

Asset Services will create an inventory database and conduct a physical field inventory for assets in the following asset classes.

### *Included Assets (Tagged)*

Asset Services will apply a property tag to items exceeding an estimated original cost of $500 (threshold) in the following asset classes:

- Information Technology
- Audio Visual Equipment
- Furniture and Fixtures
- Health & Fitness
- Athletic Equipment
- Industrial Arts (Shop) Equipment
- Science Lab Equipment
- Kitchen Equipment
- Office Equipment

### *Controlled Items (Tagged)*

"Controlled or moveable" assets will also be inventoried and individually tagged. Controlled Assets are defined as those items that cost less than the inventory threshold, but are typically inventoried. Controlled assets include the following asset classes:

- Information Technology
  - Desktop (PC's)
  - Laptops
  - IPads
  - Monitors
  - Laser Printers
  - Supporting Network Hardware
  - Wireless Tablets (airliners)
- Audio Visual Equipment
  - LCD Projectors
  - Televisions
  - DVD Players
  - Smart Boards
- Furniture and Fixtures
  - File Cabinets & Lateral Files
  - Executive Desks
  - Executive Chairs
  - Credenzas
  - Executive Conference Tables
  - Library Shelving and Tables
- Kitchen Equipment
  - Refrigerators
  - Ovens

- ▪ Ice Machines
- ▪ Dishwashers
- • Office Equipment
  - ▪ Fax Machines
  - ▪ Copiers
  - ▪ VoIP Telephony Equipment
- • Musical Instruments
  - ▪ School-owned instruments

## Included Assets (Not Tagged)

Asset Services will inventory low cost/high volume items that do not meet the cost threshold, by performing a group count of these items per location.  Group counts will be performed on items in the following asset classes:

- • Student Desks and Chairs
- • Various chairs (task chairs, stack chairs, side chairs)

## Excluded Assets

Assets excluded (out of scope) include:

- • Books
- • Hand tools
- • Assets stored in boxes or packaging
- • Non-VoIP Telephony equipment
- • Building mechanical
- • Land and buildings
- • Licensed vehicles
- • Software
- • Wireless access points
- • External hard drives
- • Personal hubs, routers, and switches
- • PDA's, Blackberry's, and cell phones

## Asset Tagging

Asset Services will apply a property tag (provided by Asset Services) to each item inventoried, as described in the Project Scope, and collect descriptive data pertaining to each item.  Property tags are white polyester material with a permanent acrylic based adhesive. The barcode symbology will be Code 39 / Code 128.  The tags are 2" X 1/2 ", and will be imprinted to include:

- • Property of USD 378
- • Asset number in bar code form
- • Asset number in alphanumeric form (human readable)

Property of USD 378

1 3 0 0 0 0 1
www.AssetServices.com

Tags will be placed in standardized locations that allow for ease of future rescans, but not interfere with proper operation of equipment.  It must be noted that tag placement is not always possible for every item (i.e. blade servers, ceiling mounted projectors, etc.).  The following describes Asset Services typical tag placement protocol:

- Tag all items, where tag placement is possible, without interfering with operation.
- If an identification tab is present on equipment (i.e. IT servers), Asset Services will place property tag on the identification tab.
- If tag placement is not possible due to situations beyond our control (i.e. item is out of physical reach, a tag may interfere with equipment operation, or the item is not conducive for a tag to be applied), Asset Services will inventory the item without an actual property tag being placed on the item.  A system generated asset number is assigned to the item and all descriptive data pertaining to the item is collected.

### Barcode Scanning

Asset Services utilizes handheld Personal Data Terminals (PDT's) for data collection. The PDT (scanner) is ideal for scan-intensive environments that require high-volume/high-quality data capture.  These PDT's will be used to scan each barcode tag and enter descriptive data pertaining to each asset.

### Data Capture (for tagged items)

The following data will be captured for each inventoried item:

- Asset Number
- Asset Description
- Facility/Location
- Room (if applicable)
- Manufacturer (if apparent)
- Model or product number (if readily available)
- Serial number (if available)

**Note**:  Asset Services will make every attempt to capture the serial number for each serialized item however, Asset Services personnel will not risk interfering with component operation.  No components will be unplugged, removed from racks, etc., in order to gain access to the serial number.

### Data Capture (for counted items)

The following data about each inventoried item will be captured:

- Asset Description
- Facility/Location
- Room (if applicable)
- Quantity

## Locations

Inventories will be performed at the following locations:

- Riley County High School 9-12 (12451 Fairview Church Road, Riley, KS  66531)
- Riley County Grade School PK-8 (117 N Remmele, Riley, KS 66531)
- District Office (204 W. Kansas, Riley, KS  66531)

## *Project Requirements and Assumptions*

The following requirements and assumptions are necessary for a timely and successful inventory:

- Asset Services Inventory Specialists will be given access to all areas of the client facility/facilities, containing items to be inventoried between the hours of 8:00 AM and 7:00 PM, Monday through Friday.

- USD 378 will provide Asset Services with floor plans and/or other appropriate information to facilitate the inventory process prior to starting the project.

- Items to be inventoried must be accessible to Inventory Specialists, without the need to move or unpack items.  Inaccessible items will not be inventoried.

- USD 378 will provide staff to facilitate access by Asset Services Inventory Specialists.  Waiting time by Asset Services Inventory Specialists in excess of ½ hour will be billed at a rate of $95 per hour per resource.  Prior to billing, the USD 378 Project Manager will be contacted to determine if the area should be bypassed or waiting commenced.  If the Project Manager is unavailable, the escalation point will be contacted.

## *Changes to Project Scope*

Any changes to the project scope will require both parties to sign a change of scope document.

## 3. Project Planning and Implementation

## *Inventory Process*

### *Communication*

Asset Services will develop a tentative schedule, with input from the USD 378 Project Manager.  Asset Services will request that USD 378 provide all facilities/schools with the tentative schedule in order for them to be prepared for the arrival of Asset Services Inventory Specialists.  Asset Services will communicate any changes to the schedule to the USD 378 Project Manager.

Upon arrival at each location, Asset Services Inventory Specialists will check in at the office and introduce themselves to the point of contact and explain the inventory process, as well as discuss any issues that may affect the inventory process, such as room usage, testing schedules, etc.

## *Project Tasks*

### *Pre-Inventory*

An initial database will be created for USD 378.  This includes designing a "Master Catalog" that represents each asset type expected to be found during the field inventory process.

### *Project Kick Off*

Asset Services Project Manager/Team Lead will review locations and floor plans for each facility with the USD 378 Project Manager, to identify any areas of the facilities that may require special attention.  Special instructions and contact information is reviewed (i.e. security policies for access to facilities, testing schedules, etc.).

### Inventory

Asset Services utilizes small, highly trained and experienced project teams. We believe small project teams provide more consistency in the data collection process, and do not overwhelm students and staff with a mass of people. Inventory teams will work in close proximity to each other and methodically progress through the facilities. The Team Lead will reference floor plans to direct the Inventory Specialists to each inventory area, and track areas that have been completed and/or will need to be revisited. Asset Services understands that accessibility to certain areas may take priority, and the order may be changed to accommodate special needs.

Asset Services Inventory Specialists are very sensitive to students, teachers, and staff, and make every attempt to minimize disruptions.

### Post Inventory

Upon completion of the inventory, the data from the bar code readers is downloaded to the inventory application in Asset Services' servers. Using Asset Services' Asset Information Management System (AIMS), this data will be reviewed for any possible anomalies such as duplicate or missing data. This data will then be used for post processing and report generation.

### Asset Valuation

Asset Services performs asset valuations based on the list of assets created from the physical inventory. To determine replacement cost, a number of sources are utilized including equipment distributors, IT distributors, furniture distributors, and manufacturers from across the U.S. Also, a number of other sources are researched including equipment catalogs, internet sources, and data gathered from previous clients. With all of these sources, Asset Services maintains a comprehensive database of values. This database is continuously updated in order to remain current.

## Project Schedule

The estimated project time for the physical inventory is 4-5 days. Upon completion of the project, USD 378 will be provided with complete reports and data. The inventory listing should be provided approximately 20 business days from the completion of the physical inventory.

The projected start date for the physical inventory is <TBD>.

## Personnel

Due to the sensitive nature of educational organizations, Asset Services uses full-time employees to perform asset inventories. This ensures that Asset Services has complete confidence in their personnel and there are never any questions related to professional behavior or the quality of the inventory procedures and results.

Asset Services is very committed to the privacy of our stakeholders, which include our employees, clients, and client stakeholders. All employees of Asset Services have successfully passed stringent nationwide criminal background checks, occupational screening, and national sex offender registry searches.

Resumes of personnel tentatively slated to be assigned to this project are located in Appendix C of this document.

### Project Management

Asset Services
Cindy Clark – Client Services Director
Cindy.Clark@AssetServices.com
(913) 383-2738 x121

USD 378
Brad Starnes
bstarnes@usd378.org
(785) 485-4000

### Escalation Points/Project Sponsors

Asset Services
Tim Michener – National Accounts Director
Tim.Michener@AssetServices.com
(913) 383-2738 x102

USD 378
Brad Starnes
bstarnes@usd378.org
(785) 485-4000

## Project Management and Quality Assurance

The following discusses Asset Services' QA process and daily status communications with USD 378 Project Manager.

### Key Factors in Achieving Consistent and Accurate Inventories

The following are key factors in achieving a consistent and accurate inventory:

- The Team Lead identifies room/area from a facility floor plan.
- The Team Lead verifies each team member has the correct location entered in their scanner.
- The team enters each room as directed by the Team Lead.
- The Inventory Specialists and Inventory Team Lead scan each item to be inventoried, with any questions directed to the Team Lead.
- When room/area is complete, the Team Lead marks off the room on the facility floor plan.

This process ensures accuracy and efficiency throughout the inventory process.

### Validation and Quality Control Process

The validation process begins in the field. It all starts with the input of standardized description codes. This maximizes the Inventory Specialists' efficiency in the field by reducing keystrokes on the hand-held device, and classifying each asset automatically. This also minimizes input error.

At the end of each day, Asset Services Inventory Team Lead performs a download of all data from the handheld Personal Data Terminals (scanners) to the AIMS application for data scrubbing.  The data scrubbing process checks for a) duplicate tag entries, b) valid locations, c) product descriptions, and d) valid scans of tag and serial numbers.  Data is also visibly inspected for consistency of descriptions and any other anomalies.

Additional descriptive data is normalized by a 6 step process:
1. Validate tag numbers, by identifying number sequence normality's, and also checking for any invalid characters.
2. Checking room numbers/names, validating proper sequence and proper location.
3. Check manufacturer's names for likeness and spelling.
4. Check model numbers and name for likeness and spelling.
5. Compare serial numbers with manufacturer names and model numbers.
6. Check any comments entered by the Inventory Specialists in the field. This could be any additional information that the Inventory Specialist determines may be beneficial.

### *Problem Notification Procedures*

Asset Services believes an open line of communication with its clients is a vital component of any project. Instant identification and resolution of any issue is paramount in completing a successful inventory and reconciliation. If an issue requires resolution immediately, Asset Services Project Manager will contact USD 378's Project Manager immediately to resolve the issue. If the issue is not pressing, Asset Services Project Manager will communicate with the USD 378 Project Manager on a daily basis and present USD 378 with a status to include completed/inventoried locations as well as any issues that may require resolution.

## 4. Deliverables

Upon completion of the project, USD 378 will be provided with the following:
- Inventory data in electronic spreadsheet format.
- Inventory data, by location, in .pdf format (electronic and hard copy).
- Replacement cost for each inventoried item.
- For annual follow up inventories (rescans), the following reports are provided:
  - Report of all items inventoried
  - Matched Items: physically inventoried assets that match directly to items on the current asset ledger.
  - Unmatched ledger Items: items on the current asset ledger that were not located during the physical inventory.
  - Unmatched Physical Items: items identified during the physical inventory that are not identified on the current asset ledger.
  - Moved Items: Items that have a changed location.

# 5. Why Asset Services

Asset Services' greatest asset is our inventory personnel.  By focusing almost exclusively on school inventories, our inventory specialists bring experience and professionalism to each project that is unparalleled.   Asset Services has been providing fixed asset inventory solutions for School Districts, Colleges, and other educational institutions for over 20 years.

Asset Services inventory specialists are highly sensitive to the concerns of educational administrators, teachers, and students. Asset Services takes pride in our ability to perform an inventory with no disruption to the educational process.

Our teams are experienced and trained in the identification of assets and equipment in educational environments including IT assets, laboratory equipment, vocational agriculture equipment, and standard office equipment and furniture, and maintenance equipment.

Asset Services' inventory teams move efficiently through schools and apply a barcode property tag to every fixed asset that meets the individual project scope. Information such as building, room, item description, manufacturer, model, and serial number will be recorded using state-of-the-art barcode data collection terminals.

The information recorded during the physical inventory is compiled into an accurate, comprehensive inventory report for use by the customer.

# 6. Fees and Rates

## Inventory Fees

Asset Services will perform the inventory as outlined in the Project Scope of this document for a fixed fee price of $4,820 (this fixed fee includes all travel expenses incurred by Asset Services personnel).

### Barcode Labels

Standard barcode labels are included in the fixed fee.  Special order barcode labels will be rebilled to the client.

### Expenses

All travel expenses incurred by Asset Services during this project are included in the fixed fee.  Additional non travel expenses required by USD 378, not otherwise defined in this scope, will be rebilled to client.

## Asset Valuation

Asset Services will perform the asset valuation, providing replacement cost for each inventoried item for a fixed fee price of $600.

# 7. Administration

## *Invoices and Billing*

Asset Services will submit an invoice for 50% of the fixed fee cost to Riley County USD 378 upon completion of the physical inventory.  The remaining 50% will be invoiced upon delivery of final reports.

Payment will be due net 30 from invoice date.  Riley County USD 378 will pay a late payment charge of one and a half percent (1.5%) per month on any overdue amount.

Riley County USD 378 agrees to pay all collection charges incurred in the collection of the amounts owed under this agreement (including the charges of any collection agency to which account is referred). In the event the account is referred to an attorney, Riley County USD 378 agrees to pay all charges and expenses, including reasonable attorney's charges and court costs, to the extent permitted by actual law.

## *Nondisclosure*

Asset Services agrees that it will not disseminate or disclose in writing or otherwise, all or any portion of the material produced for Riley County USD 378. Riley County USD 378 agrees that methods, techniques and programs which Asset Services uses to perform the inventory, constitute proprietary and confidential information of Asset Services and that Riley County USD 378, its employees, and its agents will not disclose any information to any third party.

## *Independent Contractor*

The parties agree that for all purposes hereunder, Asset Services shall be an independent contractor and shall not represent itself otherwise.

## *Liability Remedy*

Riley County USD 378's exclusive remedy for any claim arising out of or relating to this Agreement will be for Asset Services, upon receipt of written notice, either (i) to use commercially reasonable efforts to cure, at its expense, the matter that gave rise to the claim for which Asset Services is at fault, or (ii) return to Riley County USD 378 the fees paid by Riley County USD 378 to Asset Services for the particular service provided that gives rise to the claim.  Riley County USD 378 agrees that it will not allege that this remedy fails its essential purpose.

## *Assignment*

The Agreement is not assignable or transferable by Riley County USD 378.  This Agreement is not assignable or transferable by Asset Services without the written consent of Riley County USD 378, which consent shall not be unreasonably withheld or delayed.

## *Governing Law*

This agreement shall be interpreted under the laws of the State of Kansas. Any litigation under this agreement shall be resolved in the trial courts of Johnson County, State of Kansas.

## *Severability*

Should any part of this Agreement for any reason be declared invalid, such decision shall not affect the validity of any remaining provisions, which remaining provisions shall remain in full force and effect as if this Agreement had been executed with the invalid portion thereof eliminated, and it is hereby declared the intention of the parties that they would have executed the remaining portion of this Agreement without including any such part, parts, or portions which may, for any reason, be hereafter declared invalid.  Any provision shall nevertheless remain in full force and effect in all other circumstances.

## 8. Acceptance of Proposal

Signature of this document authorizes Enterprise Asset Services, Inc. to perform the above mentioned activities for Riley County USD 378.

Any estimates, written or oral, given before this agreement are null and void.

Pricing in this document is valid and binding specific to this document for a period of 2 months from the proposal date or until project completion as agreed by both parties.

A faxed copy of this document is acceptable for execution. Please fax to (212) 500-5961.

Enterprise Asset Services                                  Riley County USD 378

By:_____                              By:_____
Authorized Signature                                      Authorized Signature


_____                                 _____
Print or type name                                        Print or type name


_____                                 _____
Title                                                     Title


_____                                 _____
Date                                                      Date


                                                          _____
                                                          Purchase Order (if required)

*Shipping address for hardcopy deliverables*     *Billing address for invoices*

| | |
|---|---|
| Organization / Company | Organization / Company |
| Name | Name |
| Department | Department |
| Physical Address (No PO Boxes) | Mailing Address |
| Physical Address 2 | Mailing Address 2 |
| City, State, Zip | City, State, Zip |
| Phone | Phone |

## Appendix A – Client List

Indianapolis Public Schools

Responsive Education Charter Schools

WestEd

Imagine Schools of Indiana

University Academy

Manhattan Kansas Unified School District

Bonner Springs Unified School District

Erie-Galesburg Kansas School District

Coffeyville Kansas School District

Eudora Kansas School District

Turner Unified School District

Greenbush Southeast Kansas Education Service Center

 Gordon Parks Elementary Charter School

Crossroads Academy of Kansas City

Hogan Preparatory Academy

Academie Lafayette Charter School

Scuola Vita Nuova Charter School

Robert Treat Academy Charter School

Kansas State University- Olathe Innovation Campus

Southwest Tennessee Community College

Alabama State University

Oral Roberts University

Rockhurst University

Hackensack University Medical Center

Avila College

Washburn University

Virgin Islands Department of Education

Anchorage School District

Canutillo School District

Olathe Unified School District

Topeka School District

Blue Valley School District

Kansas City Kansas Public Schools

Kansas City Missouri School District

Park Hill School District

Cameron School District

Waukee Iowa Community School District

ADM Community Schools

Urbandale Community Schools

McDowell County School District

Platte County School District

Clinton County School District

Hickman Mills School District

Independence School District

Derrick Thomas Academy

Boonville School District

Gallatin R-V School District

Arlington Central School District

Center for Family Services

Pinellas County Head Starts

Metropolitan Community College

## **Appendix B – References**

Asset Services encourages USD 378 to contact our references and verify the quality of our processes and final deliverables.  Asset Services takes great pride in our employees' professionalism, knowledge, and communications with our clients.  We believe in delivering a quality product that can be of great use to our clients.

Merle Hastert
Olathe Unified School District
Olathe, KS
mhastertc@olatheschools.com
(913) 780-8078

Flora Montgomery
WestEd
San Francisco, CA
fmontgo@wested.org
(415) 615-3232

Ken Abramo
Kansas City Missouri School District
Kansas City, MO
kabramo@kcmsd.net
(816) 418-7282

Brad Stefanoni
Greenbush (SE Kansas Ed Service Center)
Girard, KS
brad.stefanoni@greenbush.org
620-724-6281

Lacee Sell
Chapman USD 473 School District
Chapman, KS
LSell@473mail.net
(785) 922-6521

Lora Appenzeller-Miller
Waukee Community School District
Waukee, IA
lappenzellermiller@waukee.k12.ia.us
(515) 987-5161 x4509

## Appendix C – Resumes

**Cindy Clark**
**Project Manager**
**Enterprise Asset Services, Inc.**

### Position

Cindy Clark is the Client Services Director responsible for the overall direction and management of the Operations Department.

### Responsibilities

Ms. Clark is responsible and accountable for the success of every project.  To accomplish this, Ms. Clark has the following responsibilities:

- Management of operations personnel.

- Pre-planning of projects in advance of teams being onsite.

- Project staffing.

- Close communication with the onsite team and client throughout the project.

- Management point of contact to the client for any changes in scope or issues that may occur during the project.

- Cleansing and preparation of data following the field work.

- Preparation of client reports.

### Experience

Ms. Clark has been employed by Asset Services since February 2013.   Ms. Clark has twenty-five years experience in managing people, teams and projects.  She has her PMP (Project Management Professional) certification as well as ITIL (IT Infrastructure Library) certfications at the Foundation and Intermediate levels.

**Nicholas Reynolds**
**Field Operations Manager**
**Enterprise Asset Services, Inc.**

**Position**

Mr. Reynolds is the Field Operations Manager responsible for supervising the performance of fixed asset inventories at a variety of business entities including:

- Educational organizations
- Government facilities
- Not for profit organizations
- Hospitals/healthcare facilities
- Corporations

Mr. Reynolds has been employed by Asset Services since 2003, and has been active on over 500 inventory projects.

**Responsibilities**

In his normal duties, Mr. Reynolds is responsible for:

- Onsite communications with client representative(s) in regards to project progress, questions in regards to data, and issues that may arise with access or security.
- Ensuring data is cleaned on a daily basis and uploaded to server, backed up on a separate medium and placed in off-site storage.
- Supervision of Inventory Specialists during inventory process.
- Identification of equipment meeting the project scope.
- Applying barcode labels on equipment and entering applicable data in a handheld reader.
- Tracking areas of the facility that have been inventoried.
- Training new employees in scanner use and equipment identification.
- Downloading data from handheld readers.

**Experience**

During Mr. Reynolds' employment with  Asset Services he has served as an Inventory Specialist, Senior Inventory Specialist, Project Manager, and currently as Field Operations Manager.  He has been responsible for developing and maintaining equipment identification catalogs.  He has also been responsible for training of new employees.

**Lucas Brecheisen**
**Inventory Team Lead**
**Enterprise Asset Services, Inc.**

Mr. Brecheisen is an Inventory Team Lead responsible for supervising the performance of fixed asset inventories at a variety of business entities including:

- Educational organizations
- Government facilities
- Not for profit organizations
- Hospitals/healthcare facilities
- Corporations

Mr. Brecheisen has been employed by Asset Services since 2005, and has been active on over 400 inventory projects.

**Responsibilities**

In his normal duties, Mr. Brecheisen is responsible for:

- Onsite communications with the client representative(s) and the Asset Services Project Manager, in regards to project progress, questions in regards to data, and issues that may arise with access or security.
- Ensuring data is cleaned on a daily basis and uploaded to Asset Services' Corporate servers.
- Supervision of Inventory Specialists during inventory process.
- Identification of equipment meeting the project scope.
- Placing barcode labels on equipment, and entering applicable data in a handheld reader.
- Tracking areas of the facility that have been inventoried.
- Training new employees in scanner use and equipment identification.
- Downloading data from handheld readers.

**Experience**

During Mr. Brecheisen's employment with Asset Services, he has served as an Inventory Specialist, Senior Inventory Specialist, and now as an Inventory Team Lead. In that time, he has been involved with numerous projects in all business areas. He has completed all training in equipment identification and handheld scanner use. He is also responsible for assisting in the training of new employees.

**Christian Salazar**
**Inventory Team Lead**
**Enterprise Asset Services, Inc.**

**Position**

Mr. Salazar is an Inventory Team Lead responsible for supervising the performance of fixed asset inventories at a variety of business entities including:

- Educational organizations
- Government facilities
- Not for profit organizations
- Hospitals/healthcare facilities
- Corporations

Mr. Salazar has been employed by Asset Services since 2005, and has been active on over 400 inventory projects.

**Responsibilities**

In his normal duties, Mr. Salazar is responsible for:

- Onsite communications with the client representative(s) and the Asset Services Project Manager, in regards to project progress, questions in regards to data, and issues that may arise with access or security.
- Ensuring data is cleaned on a daily basis and uploaded to Asset Services' Corporate servers.
- Supervision of Inventory Specialists during inventory process.
- Identification of equipment meeting the project scope.
- Placing barcode labels on equipment and entering applicable data in a handheld reader.
- Tracking areas of the facility that have been inventoried.
- Training new employees in scanner use and equipment identification.
- Downloading data from handheld readers.

**Experience**

During Mr. Salazar's employment with Asset Services, he has served as an Inventory Specialist, Senior Inventory Specialist, and now as an Inventory Team Lead. In that time, he has been involved with numerous projects in all business areas. He has completed all training in equipment identification and handheld scanner use. He is also responsible for assisting in the training of new employees.

**Allie Michener**
**Inventory Specialist**
**Enterprise Asset Services, Inc.**

Ms. Michener is an Inventory Specialist responsible for performing fixed asset inventories at a variety of business entities including:

- Educational organizations
- Government facilities
- Not for profit organizations
- Hospitals/healthcare facilities
- Corporations

Ms. Michener has been employed by Asset Services since 2011, and has been active on over 50 inventory projects.

**Responsibilities**

In her normal duties, Ms. Michener is responsible for:

- Identification of equipment meeting the project scope.
- Placing barcode labels on equipment, and entering applicable data in a handheld reader.
- Reporting progress to Inventory Team Lead.
- Downloading data from handheld readers.

**Experience**

During Ms. Michener's employment with Asset Services, she has served as an Inventory Specialist. Ms. Michener has been involved with several projects in all business areas. She has completed all training in equipment identification and handheld scanner use.

**Gordon Durlin**
**Inventory Specialist**
**Enterprise Asset Services, Inc.**

**Position**

Mr. Durlin is an Inventory Specialist responsible for performing fixed asset inventories at a variety of business entities including:

- Educational organizations
- Government facilities
- Not for profit organizations
- Hospitals/healthcare facilities
- Corporations

Mr. Durlin has been employed by Asset Services since 2011, and has been active on over 50 inventory projects.

**Responsibilities**

In his normal duties, Mr. Durlin is responsible for:

- Identification of equipment meeting the project scope.
- Placing barcode labels on equipment, and entering applicable data in a handheld reader.
- Reporting progress to Inventory Team Lead.
- Downloading data from handheld readers.

**Experience**

During Mr. Durlin's employment with Asset Services, he has served as an Inventory Specialist. Mr. Durlin has been involved with several projects in all business areas. He has completed all training in equipment identification and handheld scanner use.

**Matt Freeman**
**Inventory Specialist**
**Enterprise Asset Services, Inc.**

**Position**

Mr. Freeman is an Inventory Specialist responsible for performing fixed asset inventories at a variety of business entities including:

- Educational organizations
- Government facilities
- Not for profit organizations
- Hospitals/healthcare facilities
- Corporations

Mr. Freeman has been employed by Asset Services since 2012, and has been active on over 25 inventory projects.

**Responsibilities**

In his normal duties, Mr. Freeman is responsible for:

- Identification of equipment meeting the project scope.
- Placing barcode labels on equipment, and entering applicable data in a handheld reader.
- Reporting progress to Inventory Team Lead.
- Downloading data from handheld readers.

**Experience**

During Mr. Freeman's employment with Asset Services, he has served as an Inventory Specialist. Mr. Freeman has been involved with several projects in all business areas. He has completed all training in equipment identification and handheld scanner use.

**Ken Fancolly**
**Certified Personal Property and Equipment Appraiser**

## Position

Ken Fancolly is responsible for providing accurate valuation and historical costing information, and overseeing the reconciliation process.

## Responsibilities

Mr. Fancolly has been involved in hundreds of valuation and reconciliation projects. He is responsible for the continuous update of the product costing database. Mr. Fancolly performs asset valuations based on the list of assets created from the physical inventory, including condition code. To determine replacement and market values, Mr. Fancolly uses a number of sources including equipment distributors, IT distributors, furniture distributors, manufacturers, and used equipment dealers across the U.S. A number of other sources are researched including equipment catalogs, internet sources, and data gathered from previous clients. With all of these sources, a comprehensive database of values has been compiled and is updated continuously.

### Reconciliation (matching)

Mr. Fancolly reconciles data using a two-tier methodology:

#### Tier 1 Reconciliation

Tier 1 Reconciliation consists of matching items through any unique identifier available. Typically, this process involves matching by first using existing asset tag number, and secondly by serial number.

#### Tier 2 Reconciliation

If additional reconciliation of assets is necessary after completion of Tier 1 reconciliation, Tier 2 Reconciliation is performed. Tier 2 Reconciliation consists of matching assets by model/product number, manufacturer, and product description.

#### Reports

Upon completion of a typical project, the client is provided with the following reports:

- Inventory data in electronic spreadsheet format.
- Matches (assets that have identical old tag numbers and serial numbers).
- Partial Matches (assets which have either identical tag numbers or serial numbers).
- Not Found (Assets that are listed in the current asset list, but not located during inventory).
- Not Expected (capital assets located during the inventory, but do not appear in the current asset list).
- Non Capital Asset (Assets that are listed in the current asset list, but no longer meet the capitalization requirements).

## Experience

Mr. Fancolly has been employed by Asset Services since its inception in 1992. Mr. Fancolly has performed every function in regards to physical fixed asset inventories. He has a Masters in Business Administration and is a certified personal property and equipment appraiser by the Appraisers Guild of America.