



Stanford

Property Management

PMO-1000

DPA Certification Training

Property Policies, Procedures and Systems

Session Objectives

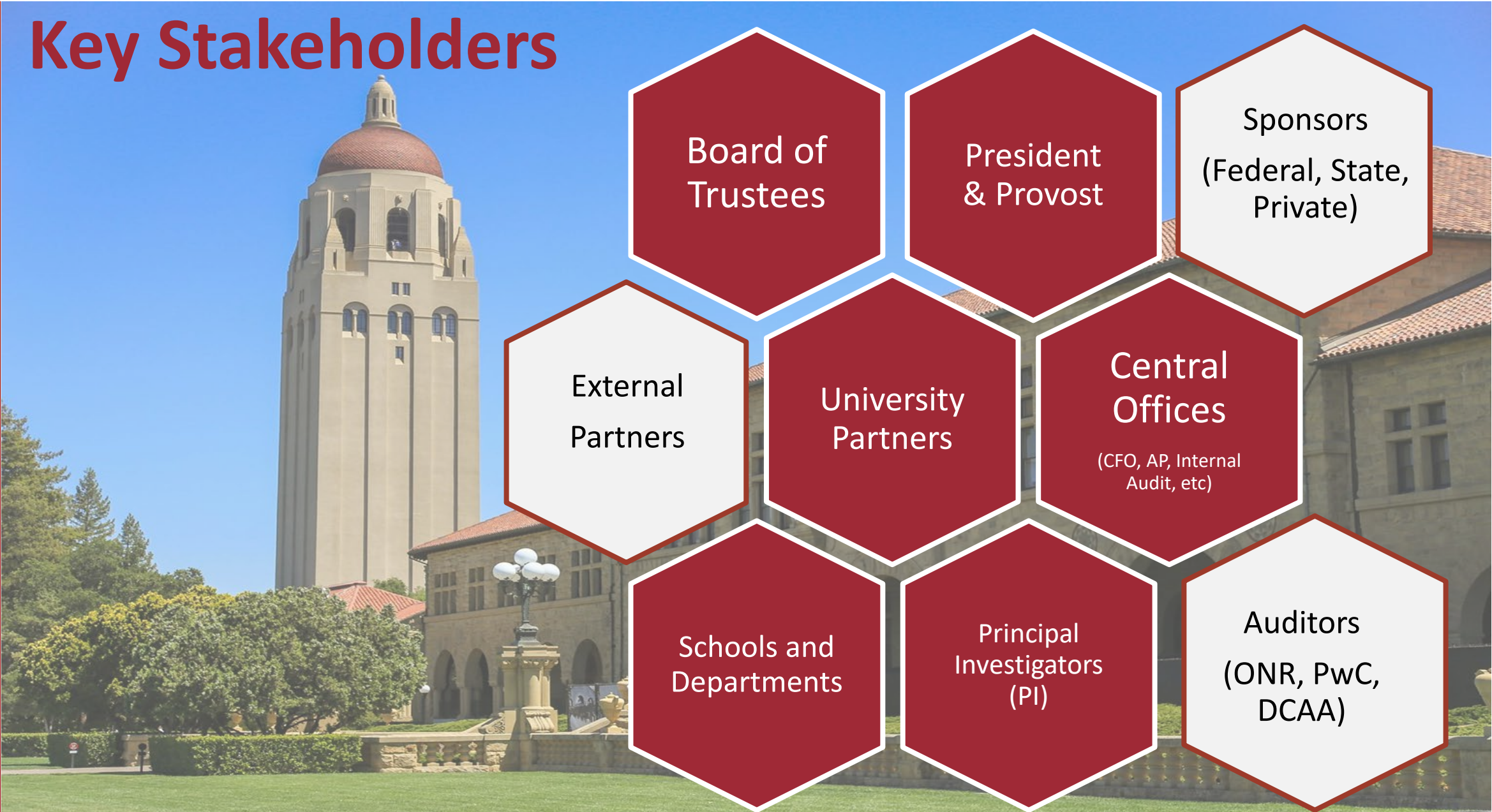
Increase	Increase understanding of the “Big Picture”
Understand	Understand Roles & Responsibilities for effective Department Property Management
Develop	Develop Working knowledge of policies and procedures
Identify	Identify and become familiar with online systems and reference tools

Why Property Management is Important to Stanford?

- Multiple “hats” that Property Serves
 - Compliance
 - Business Management
 - Asset Management
 - Stewardship
 - Financial
 - Indirect Cost Recovery (IDC)
 - Sponsor funds



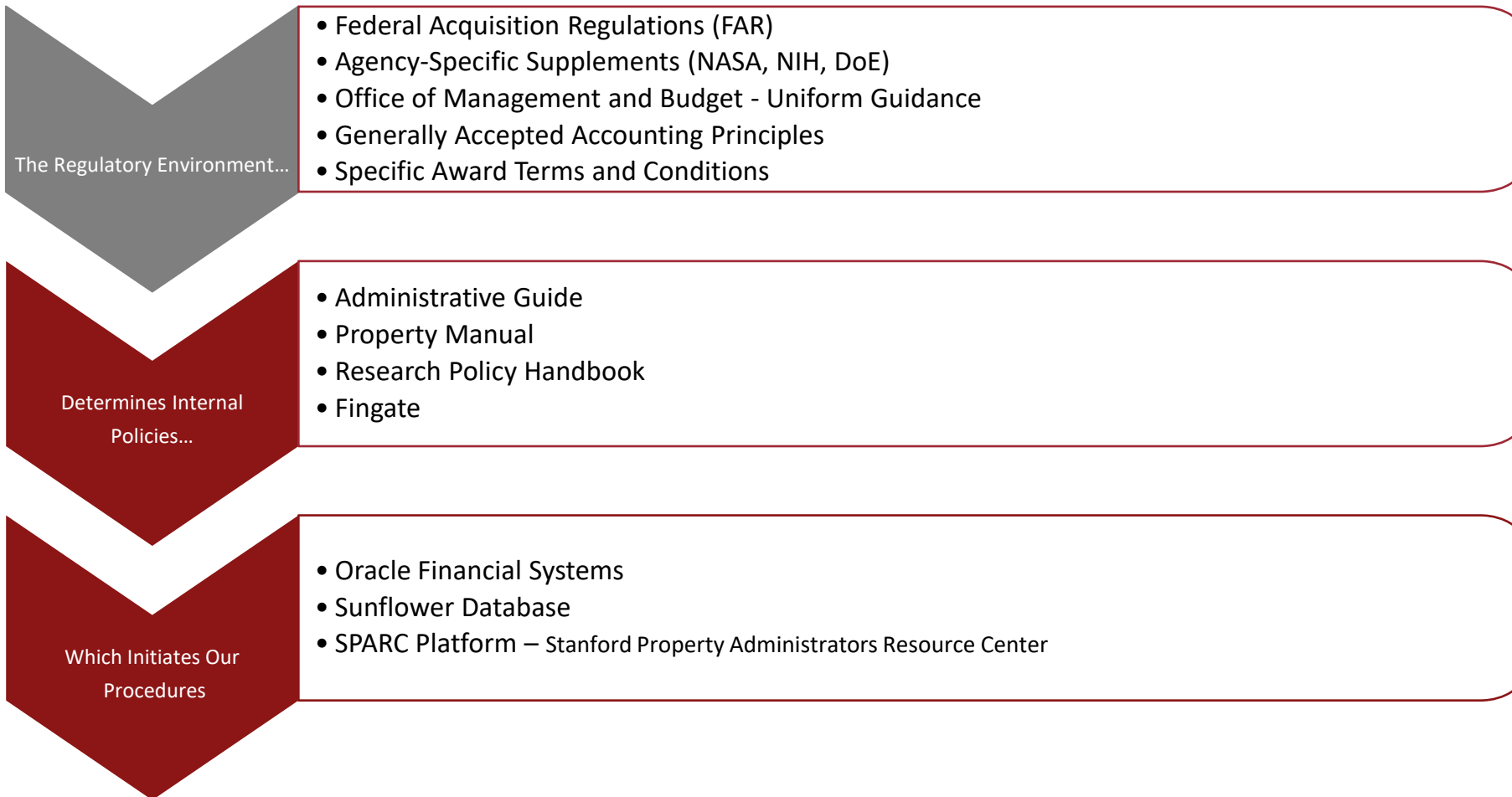
Key Stakeholders



Stanford University

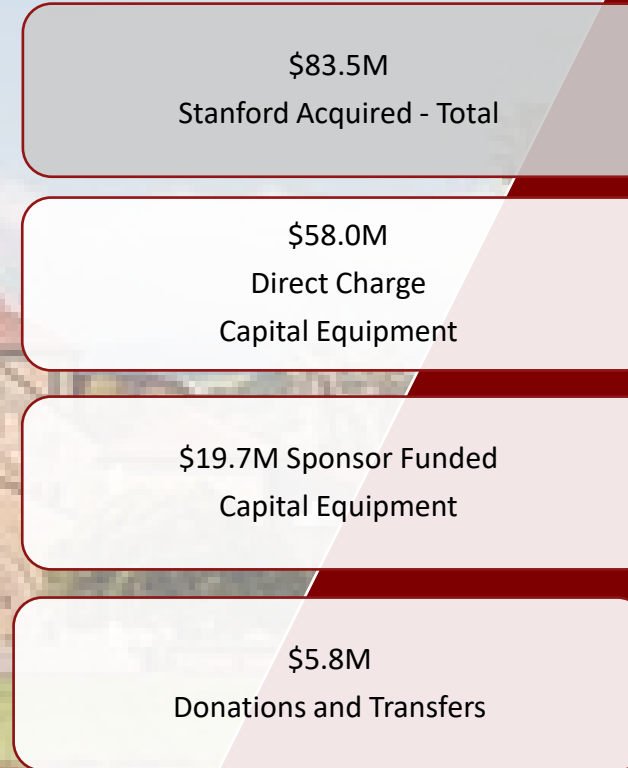


Driving Forces



Financial Perspective

FY2021 Capital Equipment Acquisitions



Over One Billion Dollar Asset Base!

Based on reconciliations posted to Fixed Assets

Campus Support Team

Scott Ray

725-9839

scottray@Stanford.edu

Kim Kaehler

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Contacts Continued...

Sponsored Research

Josh Strahan Research Property Administrator	721-7826	jstrahan@stanford.edu
Scott Ray Assistant Director	725-9839	scottray@Stanford.edu

Surplus Sales

Alex Perez Surplus Property Sales Manager	391-5542	alex.perez@Stanford.edu
Jimmy Baca Assistant Surplus Property Sales Manager	996-0574	jbaca82@Stanford.edu
Stephen Magee ReUse and Sustainability Specialist	387-6355	swmagee@Stanford.edu

To find other DPAs, use the DPA Lookup Tool
in the SPARC platform (sparc.stanford.edu)



Class Introductions

Primary DPA Roles & Responsibilities

- **Be aware of activities within your organization**
- Be an advocate for property management in your department
- Assist faculty and staff in handling property matters and understanding responsibilities
- Establish an effective communications network and be a reliable source of information
- **Establish and maintain timely, complete, and accurate property records**
- Ensure compliance and other requirements met during Biennial Inventory
- Attend property related training events
- Assist PMO with Audit activities
- Collaborate with your primary PMO liaison, the Property Programs Manager (PPM) on property issues

Top Three DPA Tasks:



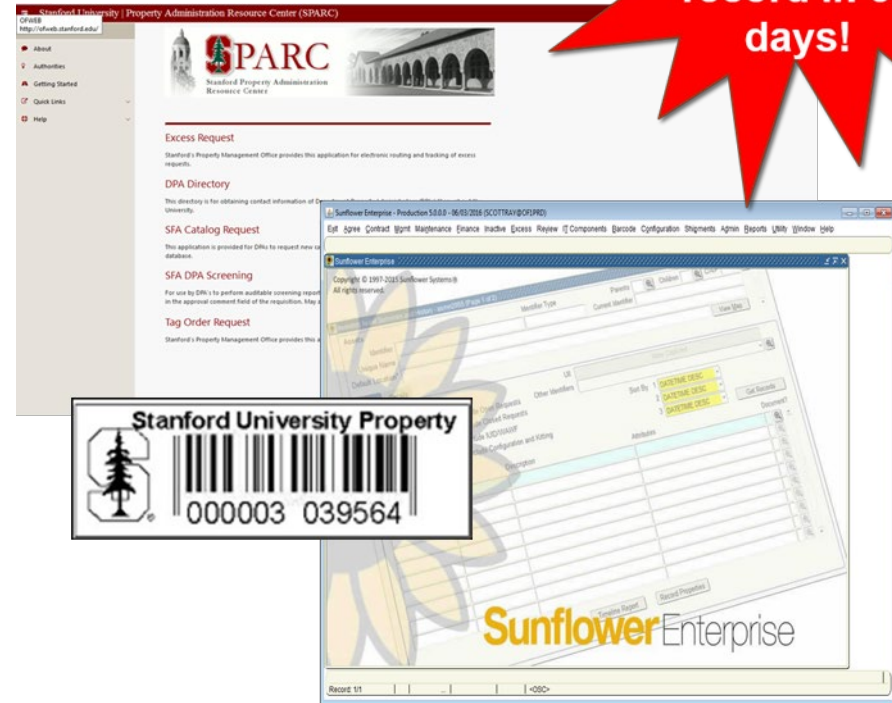
Review, screen and approve Department capital requisitions



Tag, create, and maintain property records



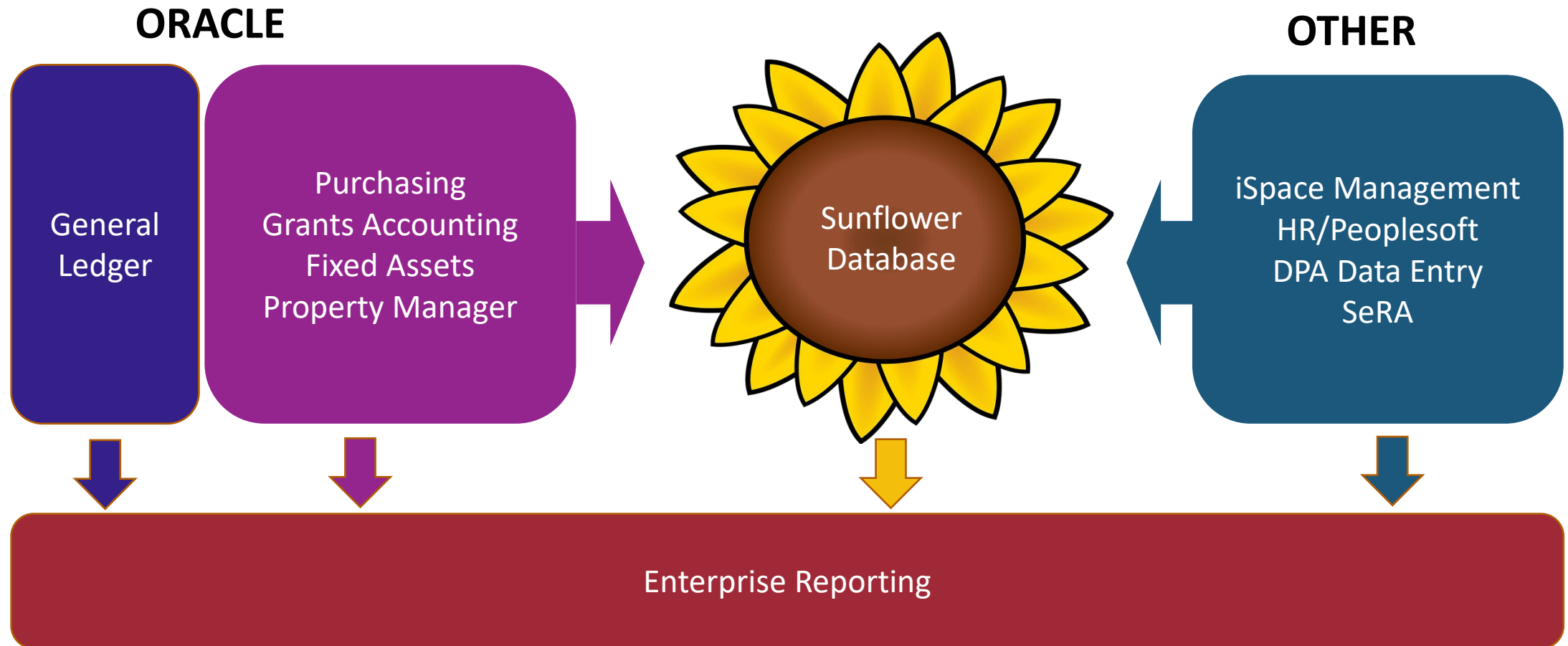
Review and approve all Department excess activities



Effective communication and outreach are the keys to completing these tasks in a timely way!



System Interactions – “Behind the Scenes”



Asset Lifecycle

All phases involve management, auditing, and reporting to various cognizant parties



Capital Equipment



Stanford University Capital Equipment Must:

- ✓ Cost \$5,000 or greater (including tax and shipping)
- ✓ Have a useful life of more than one year (2 years if NASA owned)
- ✓ Not permanently affixed to building (free-standing)

Note: Software less than \$1,000,000 is not capital unless it is an integral aspect of the equipment function – use ET 55410 for software, unless this very strict requirement is met.

Expenditure Types (ET)

Used to determine depreciation “allowability” & duration

Important to maintain consistency

See handout “Commonly Used Expenditure Types”

COMMON EXPENDITURE TYPES USED FOR PROPERTY AND EQUIPMENT

"ET"	DESCRIPTION	NOTES
	EQUIPMENT LEASES	
	(Standard Equipment Lease)	
52910	LEASE EQUIPMENT >1yr <\$5K (Note 4)	<\$5K commit. >1yr
52921	LEASE GEN PURPOSE EQUIP >\$5K	\$5k & >1YR (Admin)
52951	LEASE SPEC PURPOSE EQUIP >\$5K	\$5k & >1YR (Lab)
52981	LEASE EQUIPM 1 MO TO 1 YEAR (Note 4)	>1 Mo, < 1 Yr, any\$
52992	RENT OTHER (Note 4)	<1 Mo or other rental
	CAPITAL EXP SU OWNED (\$5K AND GREATER)	
	(Standard Capital Equipment)	Useful Life
53110	SU OFFICE FURNITURE	10 Years
53115	SU SCIENTIFIC TECH EQUIP	5 Years
53120	SU COMP EQUIP	3 Years
53125	SU EQUIP GIFTS (DONATIONS)	N/A
53135	SU MODULAR FURNITURE (Note 1)	10 Years
53140	SU VEHICLES (Note 8)	4 Years
53145	SU FIXED EQUIPMENT (Part of building, like a/c) (Note 1)	N/A
53150	SU MACHINERY TOOLS	10 Years
53155	SU OTH EQUIP 10 YR LIFE	10 Years
53160	SU OTH EQUIP 5 YR LIFE	5 Years
53175	SU EQUIP UPGRADE EXPANSION (Note 3)	5 Years
52077	SU PROCEEDS DISP CAP EQUIP (SALE)	N/A
	CAPITAL EXP NON SU OWNED (\$5K AND GREATER)	
	(Standard Capital Equipment)	Useful Life
55010	NON SU SCIENTIFIC TECH EQUIP	5 Years
55020	NON SU COMP EQUIP	3 Years
55030	NON SU OFFICE FURNITURE	10 Years
55040	NON SU VEHICLES	4 Years
55050	NON SU MACHINERY TOOLS	10 Years
55060	NON SU OTH EQUIP 10 YR LIFE	10 Years
55070	NON SU OTH EQUIP 5 YR LIFE	5 Years
	FABRICATIONS (MULTIPLE POS OVER TIME)	
	(Standard Capital Equipment)	must use fab task
53195	SU FABRICATION	Stanford-Owned
55085	NON_SU FABRICATION	Non-SU Owned
58671	INTRA-DEPT SU CAP FABRICATION (Note 5)	Stores Use
58675	INTRA-DEPT NON-SU CAP FABRICATION (Note 5)	Stores Use

"ET"	DESCRIPTION	NOTES
	NON-CAPITAL EQUIPMENT	
	(Standard Goods)	
55110	SUPPLIES MTL NON_CAP EQUIP OFFICE	postage machines, shredders, etc.
55116	COMPUTERS AND COMPUTING DEVICES	keyboards, cables, printers, etc.
55215	LAB/SCITECH NON CAP EQUIPMENT	lab equip <\$5K
	MATERIALS & SUPPLIES	
	(Standard Goods or Standard Blanket)	
55110	SUPPLIES MTL NON_CAP EQUIP OFFICE	notepaper, pens, toner, etc.
55120	SUPPLIES MTL NON-OFFICE NON-LAB	kitchen, cleaning supplies, etc.
55210	SUPPLIES LABORATORY	test tubes, materials, etc.
55230	CHEMICALS COMPRESSED GAS	oxygen, HCl, etc.
55240	LAB ANIMAL PURCHASES	rats, frogs, etc.
	POSTAGE AND SHIPPING (Standard Goods)	
55310	POSTAGE	stamps, fedex, etc.
55320	SHIPPING HANDLING (Note 2)	non-cap freight charges
	SOFTWARE LICENSES (Standard Goods)	
55410	COMP SOFTWARE LICENSES (Note 6)	MS Office, Word, Excel, etc.
	REPAIR & MAINT (DONE BY VENDOR)	
	(Standard Services)	Incl. maintenance agreements
53511	EQUIPMENT REPAIR AND MAINTENANCE	Equipment warranty or repair
53515	VEHICLE REPAIR AND MAINTENANCE	Vehicle repairs by external vendor
	MISC. EXPENSES (Various)	
54230	PROF. SERVICES - ALLOWABLE	i.e. Training, Drawings, Movers, etc.
58510	CHARGES TO/FROM OTHER DEPTS	Interdept Sales and other charges
56510	OTHER PERMITS (Note 7)	Non-Taxable Lic Fees
58455	UTILITIES AND INCENTIVES PROGRAMS	Freezer Rebates

Note 1: **MUST** be on a capital project account (use Standard Capital Project)
 Note 2: Effective 9/1/03 should be charged to same ET used for the capital asset
 Note 3: Must meet specific criteria, contact PMO before using
 Note 4: Lease ET Definitions REVISED April 2019
 Note 5: For fabrication components acquired from Stanford Stores only (Journals)
 Note 6: Software is capital IF integral to basic equipment functionality OR greater than \$1M
 Note 7: Non-taxable license fees or other permits
 Note 8: Taxable vehicle fees are coded as capital
 For more complete definitions see the Chart of Accounts section in Pingate:
<https://stanford.app.box.com/v/pingate-obi-exp-type-active>

Available online @ PMO website or SPARC.edu>Quick Links

Acquisition Cost

This chart specifies the type of costs that are associated with capital equipment purchases.



Include in Cost Use Capital ET	Exclude from Cost Use appropriate Non-Capital ET	Deduct from Cost
Main Unit Purchase Cost – e.g.: Microscope	Professional Services – e.g.: training	Trade-In value
Accessories – e.g.: lenses, magnifier, etc.	Extended Warranty	Educational Allowance/Discount
Sales Tax – where applicable	In-transit Insurance	Any other discount
Installation with Vendor Labor	Installation with Stanford Labor	
Federal Excise Tax		
Freight/Shipping		
Duty		

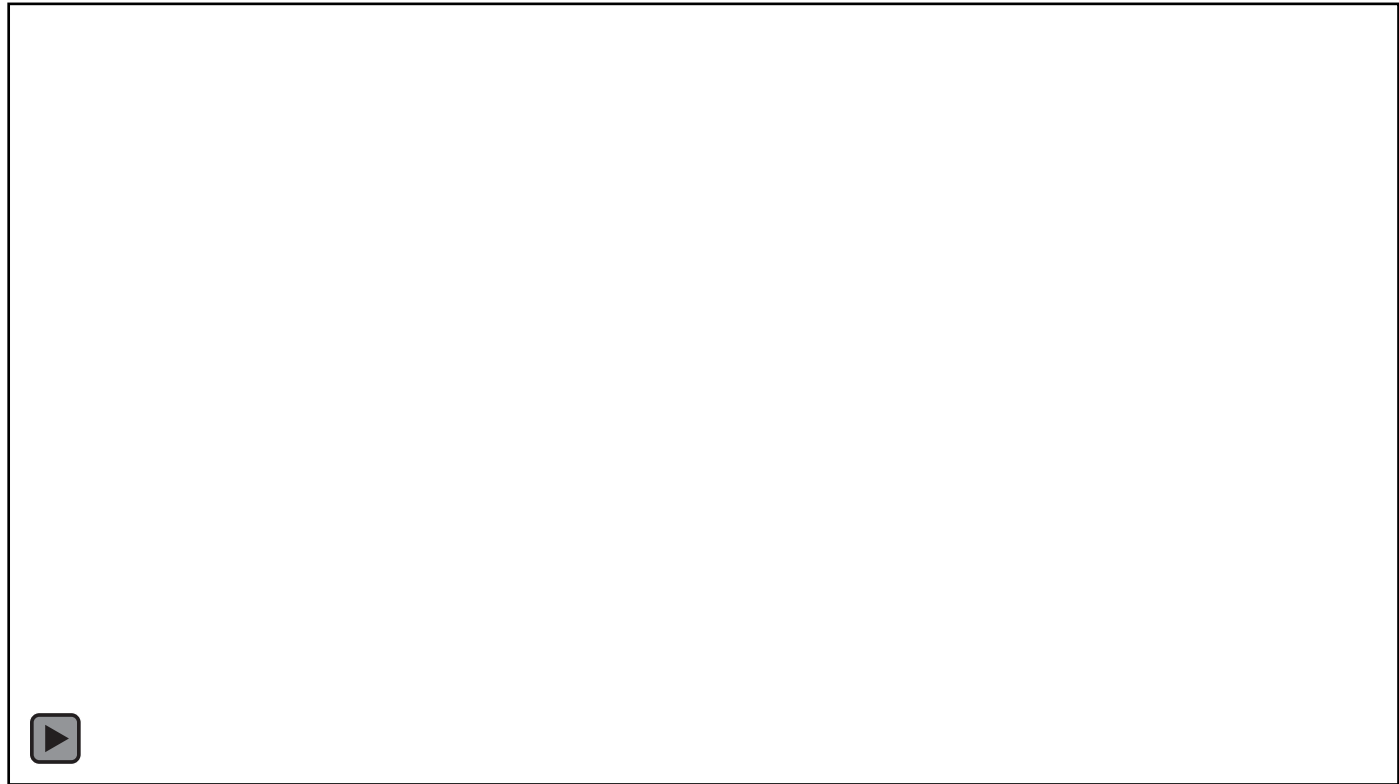
Purchase Requisitions

- The type of requisition controls ET use and routing:
 - Standard Capital Requisition
 - Allows use of capital ETs
 - Forces routing to include a DPA approver
 - ET use also controls routing
 - Capital ET routes to PMO end route
 - Requisitions, P-Cards, and Reimbursements
 - Using Multi type lines



Acquisition Methods

- Purchases
- Leases
- Loans
- Incoming Transfers
- Donations



Use the Standard Capital Equipment category of the purchase requisition for capital acquisitions (except leases)

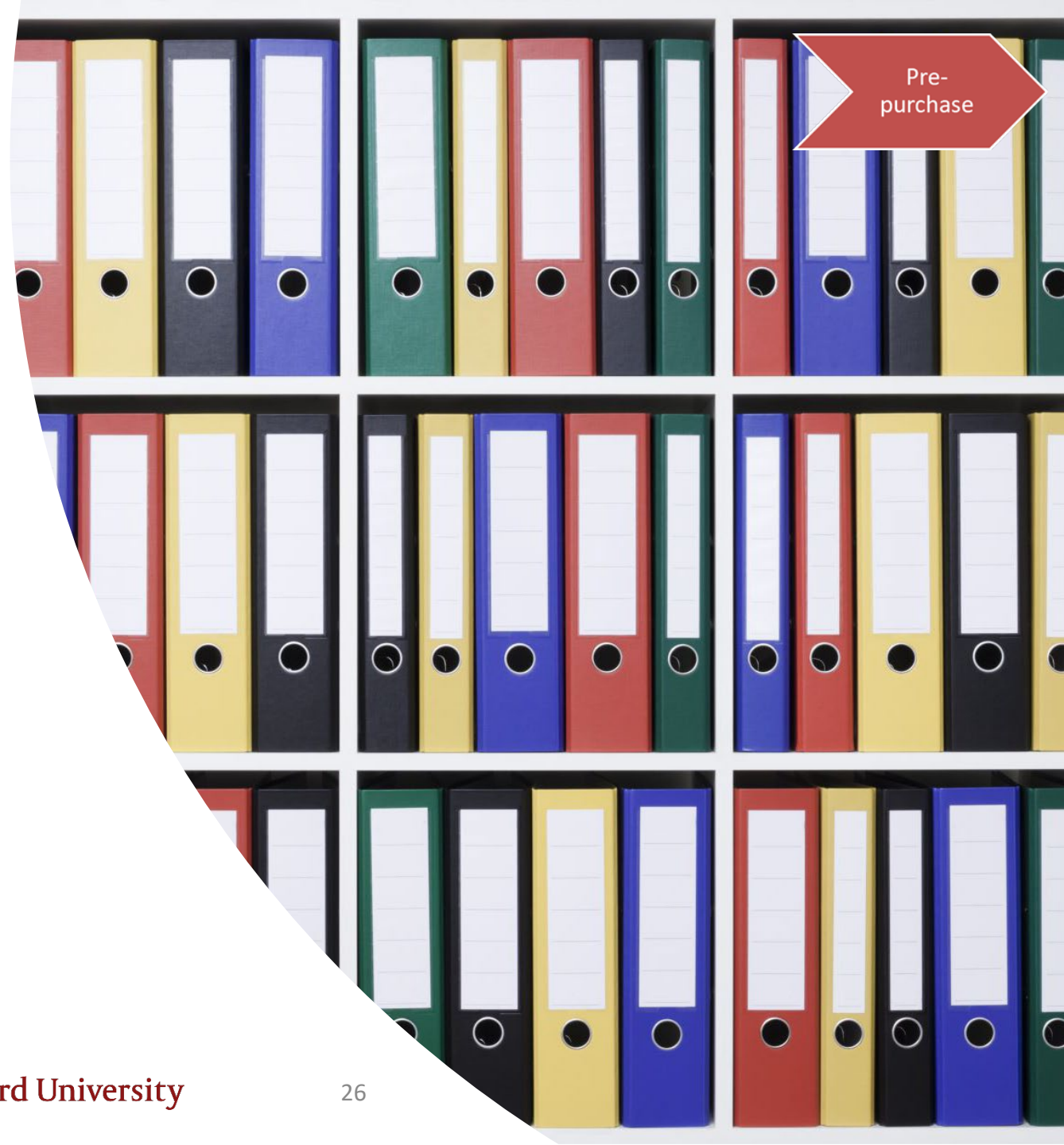
Sales and Use Taxes

Local Sales Tax applies to all acquisitions by Stanford. If the tax is not collected by the vendor directly (out of state orders, etc.) it will be automatically charged internally, and sent to the State of California as “Use Tax”.

- Notable Exceptions:
 - **Federal Ownership**
 - If the item will be owned (not just funded but owned) by a federal sponsor, there can be no sales tax
 - Tax should be overridden at requisition stage
 - **Research Equipment Tax Reduction**
 - Research equipment is granted an approximately 4% reduction in California sales tax
 - Certain PTA/ET combinations are automatically given this reduction in the Procurement system – others must be requested case by case

Approver Responsibilities

- Approval Review
 - ✓ The DPA is responsible to review the ET's to identify any errors
 - ✓ Complete screening
 - ✓ Note the report number on the requisition
- Common Errors
 - Approval with an incorrect ET
 - Not entering the screening in the requisition
- How to avoid these errors
 - Make a reminder note with task list
 - Call your PPM – it never hurts to ask!



To Review

COMMON EXPENDITURE TYPES USED FOR PROPERTY AND EQUIPMENT

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	MISC. EXPENSES (Varies)	
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For more complete definitions see the Chart of Accounts section in Fingate:

<https://stanford.app.box.com/v/fingate-obi-exp-type-active>

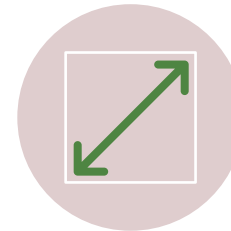
Pre-Purchase Screening



CHECK FOR EXISTING ASSET
AVAILABILITY TO AVOID
UNNECESSARY OR
DUPLICATIVE PURCHASES



A POTENTIAL COST SAVINGS
TO THE UNIVERSITY



MAXIMIZE RE-UTILIZATION

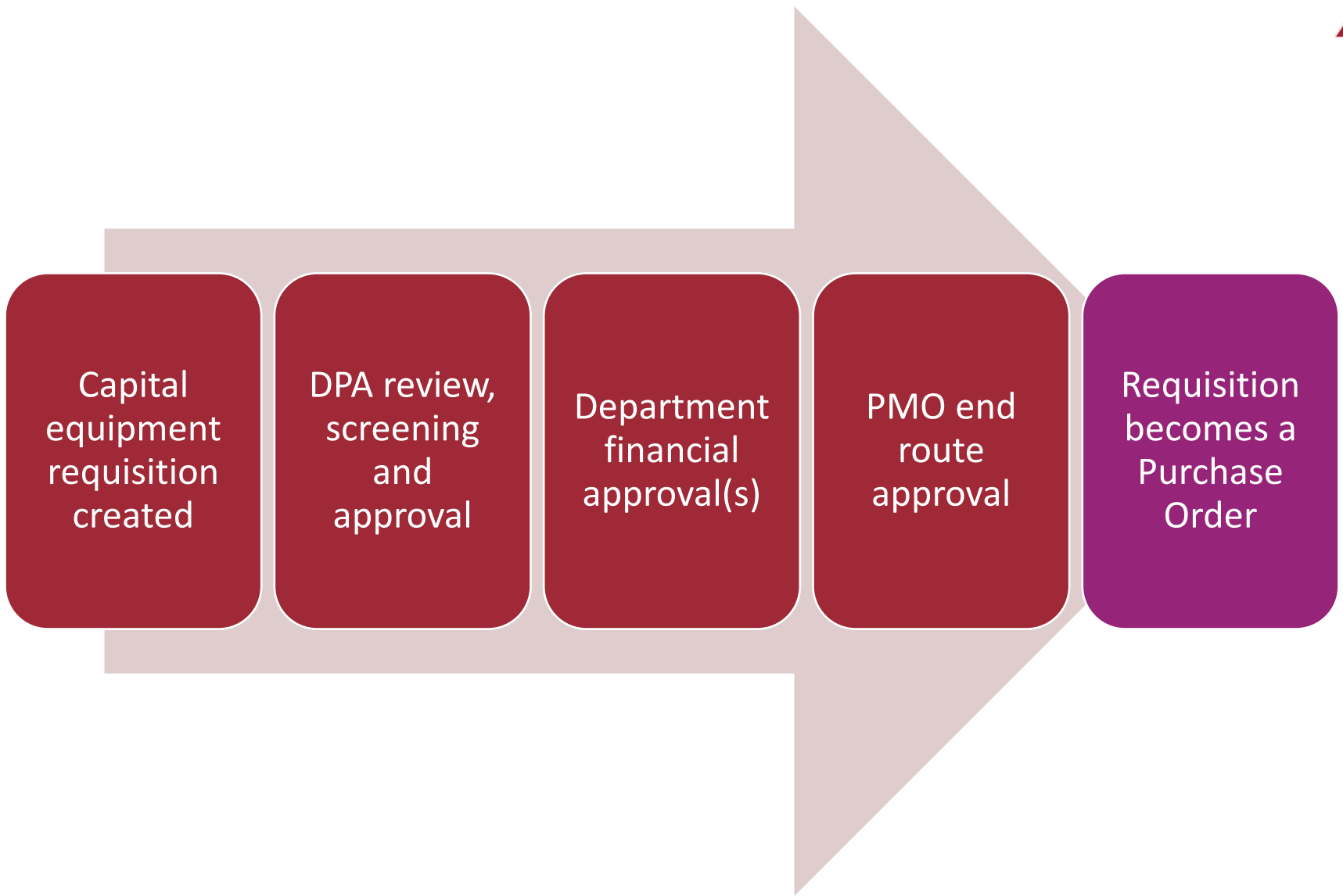


AUDITABLE COMPLIANCE
REQUIREMENT

Run report in SPARC, enter the Search ID# in the approver notes







Leases

FASB* requirements:

*Federal Accounting Standards Board

1. Leases must be reported on financial statements in more detail
2. Full disclosure of lease liabilities
3. Differentiation between financial and operating leases

But what does that mean for me, the DPA of my department?



Leases

Requisition Types

- Standard Equipment Lease
- Standard Equipment Lease Change Order

Lease Expenditure Types

ET	Type	Terms
52910	Lease Equipment	>1 Year /< \$5,000
53921	Lease General Purpose Equipment	>1Year / >\$ 5000
52951	Lease Special Purpose Equipment	>1Year / >\$ 5000
52981	Lease Equipment	>1Month and =< Year/ any amount
52992	Rent Other	<1Month does not qualify as any of the above

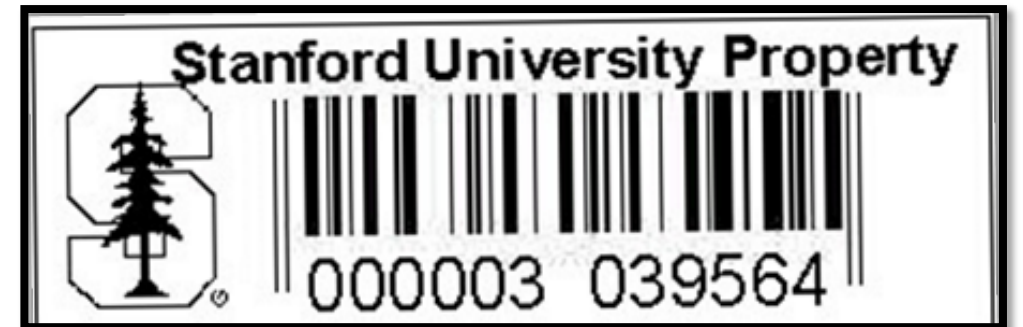
Other Lease Attributes

Additional lease elements to be considered at the requisition phase:

- Is there an option to renew, and is it likely you will? This may impact the ET. (for those 1 year or less but likely to renew)
- The total commitment for the life of the lease should be entered – not just one month, one year or other portion.
- If maintenance or other charges are in the agreement, but not part of the actual lease payments, they should be on the same requisition, coded correctly

Tagging and Recording Leased Assets

- Leased equipment must be tagged and recorded in the Sunflower Database.
- Leases are part of the “Unmatched” review and monitored monthly by PMO.
- You will receive notification if you have an outstanding lease.



Incoming Loans

Incoming loans are comprised of property which has been provided to Stanford free of charge, for a specified period of time (short or long term), by an institution or individual. Loans of equipment originate primarily for:

Loan Purpose	Required Documentation
Manufacturer Evaluation	Contract
Clinical Trial Support	Trial Agreement
Other Sponsored Research Support (Including Collaborative Research)	Complete a Research Related Agreement (RRA) form in SeRA

Notify your PPM for all incoming loans of any type!



Property Management Office

Incoming Loan Document

PMO Generated Loan # _____ Loan Period (MM/DD/YY) From _____ to _____

Lenders Information

Institution/Company Name _____

Contact Name _____ Phone Number _____

Address _____

Borrowers Information

Stanford University Department _____ PI Name _____

Contact Name (If different from above) _____ Phone Number _____

Address _____

Loan Information

Purpose of Loan: _____

Location where property will be used: _____

Reference/Contractual (Flow Down) _____

Loan Agreement _____ if loaned for use on a current Agreement.

Restrictions on Use (If any): _____

Asset Information

SU ID # _____ Manufacturer _____ Model Number _____

Name/Description _____ Serial Number _____ Owner _____

Acquisition Value \$ _____ Is more than one item being loaned? (Y/N) _____

If yes, please utilize second sheet.

Approvals

Lender Representative Name	Signature	Date
Department Property Administrator	Signature	Date
Property Program Manager or PMO APPRV	Signature	Date

Property Management Office, 485 Broadway | 3rd Floor MC 6025 | Redwood City, CA 94063 |

Stanford Loan Form – Incoming

Property Management Office Website > Forms and Documents

Incoming Transfers

Transfer of equipment from/to other institutions may require considerable effort, and certain information will be requested from the DPA. A complete list can be found in the Property Manual Chapter 2.4 Section 3 – 37.

The following apply in all cases:

- Itemized list of equipment transferring
- Name and contact information for relinquishing/receiving institution
- Original funding sources(s) of the equipment(federal, other)
 - Are there transferring grants with the equipment?

Note: Sponsor owned transfers must be facilitated by PMO, contact your PPM.

Donation Requirements

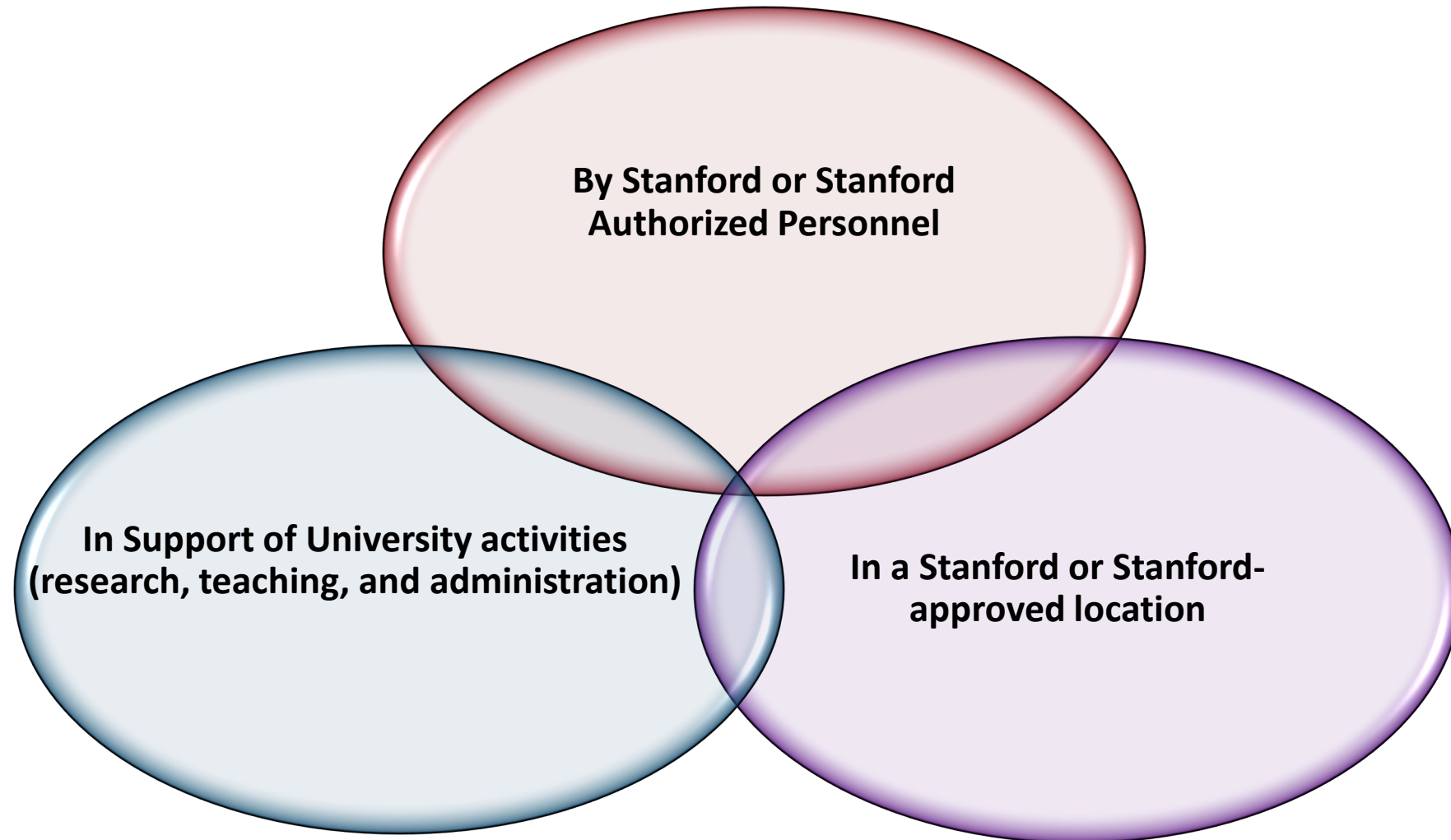
- In all cases, there must be a letter of intent from the donor, which can vary from a simple email to a multi-page donation agreement.
- Donations of used equipment, donations from individuals, and non-manufacturing businesses will be evaluated by PMO, and the fair market value will be established. In the case of new equipment, fair market value will be the manufacturer's suggested retail price (MSRP) for PMO use and recording of capital equipment donation.
- The recipient department will generate a requisition for donations which are considered Capital Equipment, contact your PPM for guidance.
- Per the IRS regulation, donated equipment must be kept for a minimum of three years.
- Some donors may require additional documentation – contact your PPM

Be sure your Department knows to contact you as soon as they are aware of an incoming donation.





University Assets are to be used only:



Stanford University

Capital Cost Transfer

PMO – 5010 (STARS)
1:1 Zoom with PPM

The screenshot shows the Stanford University Property Administration Resource Center (SPARC) website. The browser tabs include SUPAD, Oracle iProcurement: Shop, Purchase Order(PO) 62569007 We, PTA Details, and Attachments. The URL is https://sera-uat.stanford.edu/apex/f?p=300:20:7917262324519:.... The page header reads "Stanford University | Property Administration Resource Center (SPARC)". A left-hand navigation menu contains links for "SPARC Home page", "About", "Authorities", "Getting Started", "Quick Links", and "Help". The main content area features the SPARC logo and a grid of application tiles. The "Capital Cost Transfer" tile is highlighted with a red border and contains the following text: "This application is used to process cost transfers that involve a capital expenditure type. It provides financial approval routing and dashboard status monitoring. For additional information visit: [https://stanford.edu/sera/um/property-management-office](#)". Other visible tiles include "Excess Request", "DPA Directory", "Sunflower Catalog Request", "Pre-Purchase Screening", "Tag Order Request", "ReUse Request", and "Surplus Sales".

For more information about CCT:

- <https://ora.stanford.edu/ora-units/property-management-office/capital-cost-transfers-cct-news-and-updates>

Capital Cost Transfers (CCT) News and Updates

Office of Sponsored Research - Pre Award

Office of Sponsored Research - Post Award

Sponsored Receivables Management

Client Advocacy & Education

Cost and Management Analysis

Property Management Office

Property Management Manual

Capital Cost Transfers

Team Members

Campus Support Team

Surplus Property Sales

Training

Forms and Documents

User Guides, Tutorials, Reference Material

Research Administration Policy and Compliance

ORA Administrative Support

DATE	EVENT
• October 7, 2022	• Resources available below
• November 7, 2022	• Application available for use
• January 9, 2023	• Capital Template mailman list retired

Key Training Opportunities

October 17, 2022 - Pre-Launch Presentation 1
October 24, 2022 - Pre-Launch Presentation 2
November 10, 2022 - Soft Launch Informational Presentation
January 17, 2023 - Post Launch Informational Presentation

See the information and resource section below for more

Asset Identification

Purpose

- Identify Ownership
- Standardize designation of asset control numbers
 - Allows rapid access to record information in System
- Facilitates Inventory
- Deters Theft

Placement

- The SUID Tag should be readily visible and accessible
 - On the front, upper right-hand side is the “default” location

Source

- Provided at no cost by PMO
- SPARC Tag Order Request Form

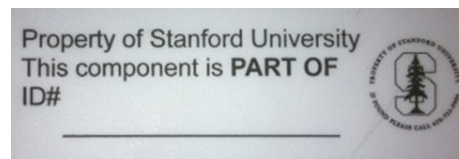
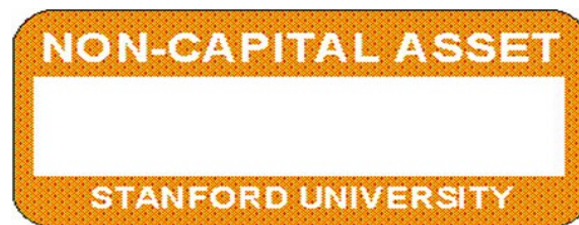


**Remember:
receipt to
record in 30
days!**

Asset Identification

Additional Options Available:

1. Non-Stanford Owned
2. Government Owned
3. Non-Capital Equipment
4. Donated Equipment
5. Component Tag
6. NEW – Relocation Tag



If owned by the
US Government,
this tag is
required

U.S. Government Asset

Stanford University Capital Equipment
PRIOR TO RELOCATING, please notify your
Department Property Administrator (DPA)

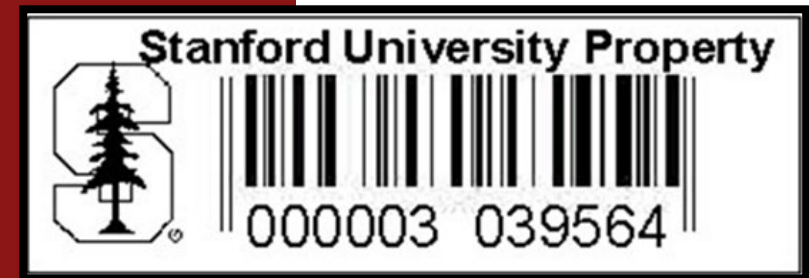
DPA directory information can be found
by visiting sparc.stanford.edu



SFA – Sunflower Database, used to maintain the University’s official individual asset records for:

SFA Record Required-

- Capital Equipment
- All Non-Stanford owned property, regardless of cost
 - Loans, Leases, Sponsor owned
- Donated Capital Equipment
- Capital Equipment transferring to Stanford
- Capital Fabricated Equipment and other accountable assets



Any non-capital property that the department elects to track for internal reporting:

Optional SFA Record -

- Computers and other data devices
- Equipment used in hazardous labs
- Projection equipment
- Camera and other small 'desirable' electronics
- Non-capital items transferred to Stanford



Sunflower Database Overview

Screenshot of the Sunflower Enterprise software interface. The window title is "Sunflower Enterprise - Production 5.0.0.0 - 08/25/2016 (KKAehler@OF1PRD)". The menu bar includes: Exit, Agree, Contract, Mgmt, Maintenance, Finance, Inactive, Excess, Review, IT, Components, Barcode, Configuration, Shipments, Admin, Reports, Utility, Window, Help.

The main interface shows a "Sunflower Enterprise" window with a copyright notice: "Copyright © 1997-2015 Sunflower Systems® All rights reserved." Below this is a "Parents" and "Children" section with a "View Map" button.

The central area displays a table with columns: Identifier, Unique Name, Default Location, Datetime, Category, and Description. The table is currently empty. To the left of the table are several filter checkboxes, all of which are checked:

- Include Events
- Include Resolutions
- Include Contract Reports
- Include Meter Readings
- Include Open Requests
- Include Closed Requests
- Include IJDIWAWF
- Include Configuration and Kitting

Below the filters is a "Sort By" section with three dropdown menus, all set to "DATETIME DESC":

- 1 DATETIME DESC
- 2 DATETIME DESC
- 3 DATETIME DESC

At the bottom of the interface, there are buttons for "Timeline Report" and "Record Properties". The status bar at the very bottom shows "Record: 1/1" and navigation controls including "<OSC>".

Sunflower Enterprise

**Remember:
receipt to
record in 30
days!**

Acquisition Methods

The screenshot displays the Sunflower Enterprise software interface. The main window is titled 'Maintain Inventory Assets - asmn2010 (Page 1 of 2)'. The 'Inventory Assets' form is visible, with the 'Acquisition Method' field set to 'PURCHASE'. An 'Initial Event Types' dialog box is open, showing a list of event types including DONATION, EVEN EXCHANGE, FABRICATION, GOVERNMENT FURNISHED PROPERTY, INVENTORY ADD, LEASE, LEASE EXPIRED, LOAN (INCOMING), PURCHASE, RENT, and TRANSFER. The 'PURCHASE' option is highlighted in the list. The form also shows fields for SU Barcode # (7109300), Default Location, Catalog Identifier (148723), Manufacturer (LEICA), Official Name (CRYOSTAT), Serial Number (1868/10-2015), Acquisition Cost (\$26,462), Asset Condition (1 GOOD), Activity Status (IN SERVICE), Business Unit (VAAA - SCHOOL OF M...), Department (XDCI - OPHTHALMOLC...), Custodian (04395877), User (09648622), Location (20 - PORTER DRIVE__BLDG-FLOOR_081-02__ROOM_2158), and Document #.

The form defaults to PURCHASE, you can change by selecting another method from these options.

Ownership of Asset

Sunflower Enterprise - Production 5.0.0.0 - 02/01/2019 (KKAHLER@OF1PRD)

Exit Agree Contract Mgmt Maintenance Finance Inactive Excess Review IT Components Barcode Configuration Shipments Admin Reports Functions Utility Window Help

Maintain Inventory Assets - asmn2010 (Page 1 of 2)

Inventory Assets

U/I: None Captured

Other Identifiers (1): INV / 7109300

SU Barcode #: 7109300 U/T: T

Existing interest asset: []

Default Location*: []

Catalog Identifier*: 148723

Manufacturer: LEICA

Official Name: CRYOSTAT

Serial Number: 1868/10-2015

Acquisition Method: PURCHASE

Acquisition Cost*: \$ []

Asset Condition: 1

Activity Status: IN SERVICE

Business Unit: VAAA - SCHOC

Department: XDCCI - OPHTH

Custodian: 04395877

User: 09648622

Location*: 20 - PORTER

Document*: []

Do Not Use*: []

Global User Fields*: 1213750__11025.88__2015__ALLOW

Parents: 0 Child: []

Model: CM 1860

Model Name: []

Work Number: []

Today's Date: []

Due Date (PMO Use Only): []

Owner: []

First: JEFFREY Mid: LOL

First: KRISTINA Mid: []

Container Number: []

Drawing No.: []

Buttons: Add to Working List, Add'l Information, Commodity, Comment / Picture / Attachment, Re-Request, Asset Configuration, Asset Kit

Federal, Others and Stanford University are the only options to be used

Accountability – Stewardship Responsibility

Utilization

Business
Unit

- The over-arching budget unit for the for the Department. Usually a School-level or equivalent Organization

Department

- The Department to which the asset is accountable, selecting from the university org hierarchy

Custodian

- The individual who has authority to determine use, relocation or other decisions affecting the asset

Custodians

- Identified in Sunflower
 - Reportable and auditable
- Custodian must be Stanford Staff
 - Cannot be an affiliate, student or temporary employee
 - Should have decision making authority to move, transfer or otherwise dispose of the asset
- Does not need to be the end user
 - Additional identification fields are available for user(s)



Custodians can be a critical source of location information during an inventory

Custodian and User

Sunflower Enterprise - Production 5.0.0.0 - 06/08/2016 (KKAehler@OF1PRD)

Exit Agree Contract Mgmt Maintenance Finance Inactive Excess Review IT Components Barcode Configuration Shipments Admin Reports Functions Utility Window Help

Maintain Inventory Assets - asmn2010 (Page 1 of 2)

Inventory Assets

UII

Other Identifiers (1)

SU Barcode #	U/T	Type	SU Barcode #	Released?
7109300	T			Y

Existing interest asset

Default Location*

Catalog Identifier* Commodity Asset

Manufacturer Material

Official Name

Serial Number

Acquisition Method

Acquisition Cost*

Asset Condition

Activity Status

Business Unit

Department

Custodian Last Name* First Mid

User Last Name* First Mid

Location* Container Number

Document*

Do Not Use*

Global User Fields*

Accepted?

Owner

DPA

Record Last Updated

Due Date (PMO Use Only)

Flags* Do Not Use

Buttons: Add'l Information, Commodity, Comment / Picture / Attachment, Re-Request, Asset Configuration, Asset Kit

The default location of the asset. Press Edit to display or edit default location

Record: 23/42

There is also an optional User designation, which can be an individual or a group – the system has different fields available for this.

Federal & Sponsor Owned Property

- Overview
 - What defines Title/Ownership
 - Federal
 - Non-Federal Sponsor
- Importance of Stanford Stewardship
 - Accountability
 - Loss Damage Destruction Theft (LDDT)
- DPA & Custodian Role
 - Asset Identification
 - Record Creation and Maintenance
 - Communication with PMO
- PMO Role
 - Asset Record Maintenance
 - Yearly Inventory
 - Sponsor Approvals when needed

SHIPPING CONTAINER TALLY 1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16 17 18 19 20 21 22 23 24 25 26 27 28 29 30 31 32 33 34 35 36 37 38 39 40 41 42 43 44 45 46 47 48 49 50

REQUISITION AND INVOICE/SHIPPING DOCUMENT CRM No. 0704-0304
CRM Approval Expires Apr 30, 2009

The public reporting burden for this collection of information is estimated to average 1 hour per response, including the time for reviewing instructions, searching existing data sources, gathering and maintaining the data needed, and completing and reviewing the collection of information. Send comments regarding this burden estimate or any other aspect of this collection of information, including suggestions for reducing the burden, to the Department of Defense, Executive Service Directorate (0704-0340). Responses should be aware that notwithstanding any other provision of law, no person shall be penalized for failing to comply with a collection of information if it does not display a currently valid OMB control number.

PLEASE DO NOT RETURN YOUR FORM TO THE ABOVE ORGANIZATION. RETURN COMPLETED FORM TO THE ADDRESS IN ITEM 2.

1. FROM (Include ZIP Code) SHEET NO. 1 OF 1 REQUISITION DATE 2. REQUISITION NUMBER

3. TO (Include ZIP Code) 4. DATE MATERIAL REQUIRED (YYYYMMDD) 5. PRIORITY

6. AUTHORITY OR PURPOSE

7. SIGNATURE 8. VOUCHER NUMBER & DATE (YYYYMMDD)

3. SHIP TO: MARK FOR

4. APPROPRIATION DATA

ITEM FEDERAL STOCK NUMBER, DESCRIPTION, AND CODING OF MATERIAL AND/OR SERVICES

U/I None Captured
Other Identifiers (1) AGR_INV / 7111785

Type SU Barcode # Released? Y

Existing interest asset

U.S. Government Asset

Catalog Identifier* 124063 Commodity Asset Parents 0 Children 0 C/A/P CA
Manufacturer FLUIDIGM CORPORATION Material Model FCI CYCLER
Official Name THERMAL CYCLER Model Name
Serial Number 60266 Document? Stock Number

Acquisition Method LOAN (INCOMING) N User Fields*
Acquisition Cost* \$26,100.00 Acquisition Date 12/14/2012 Today's Date 12/14/2012
Asset Condition 1 GOOD CONDITION Record Last Updated 10/11/2017 Due Date (PMO Use Only) 10/17/2017
Activity Status IN SERVICE Flags* C EH Do Not Use
Business Unit STANFORD UNIVERSITY Owner FEDERAL
Department WAZC - GENETICS Accepted? Y DPA ORANTES ALEXANDRA M 05438358
Custodian 03361466 Last Name* SNYDER First MICHAEL Mid P
User Last Name* First Mid
Location* 07 - MEDICAL CENTER_BLDG-FLOOR_307-03_ROOM_M303
Document* Container Number
Do Not Use* Drawing No.
Global User Fields* LI LAB_2011_UNALLOW

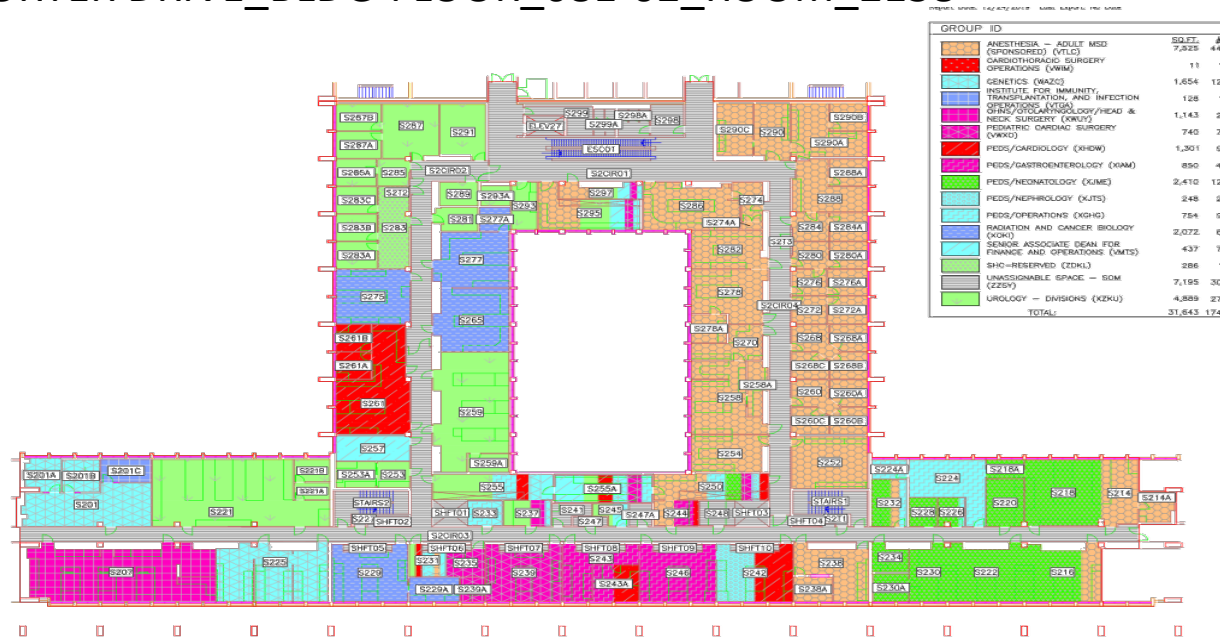
Add to Working List Add Information Commodity Comment / Picture / Attachment Re-Request Asset Configuration Asset Kit

DD FORM 1149, JUL 2006 01 02 03 04 05 06 07 08 09 10 11 12 13 14 15 16 17 18 19 20 21 22 23 24 25 26 27 28 29 30 31 32 33 34 35 36 37 38 39 40 41 42 43 44 45 46 47 48 49 50 PREVIOUS E

Asset Location

SFA/FIMS (iSPACE) Interface

- Location structure:
 - Quad_Building-Floor_Room
- 20 – PORTER DRIVE_BLDG-FLOOR_081-02_ROOM_2158



Areas of implication include:

- Indirect Cost Recovery
- Use
- Audit
- Inventory
- Compliance



BUILDING ADDRESSES

[Additional references](#) for operational and public safety personnel (Special Access Only)

Showing 100 buildings

Filter:

BLDG ID	NAME	ZONE	NUMBER	STREET NAME	CITY	PARCEL
00-000	GENERAL	D				
01-000	QUAD 01 - GENERAL	D				
01-001	BUILDING 1 - MAIN QUAD	D	450	JANE STANFORD WAY, BLDG. 1	STANFORD	142-07-086
01-010	PRESIDENT'S OFFICE	D	450	JANE STANFORD WAY, BLDG. 10	STANFORD	142-07-086
01-020	BUILDING 20 - MAIN QUAD	D	450	JANE STANFORD WAY, BLDG. 20	STANFORD	142-07-086
01-030	STANFORD LANGUAGE CENTER	D	450	JANE STANFORD WAY, BLDG. 30	STANFORD	142-07-086
01-040	BUILDING 40 - MAIN QUAD	D	450	JANE STANFORD WAY, BLDG. 40	STANFORD	142-07-086
01-050	BUILDING 50 - MAIN QUAD	D	450	JANE STANFORD WAY, BLDG. 50	STANFORD	142-07-086
01-060	BUILDING 60 - MAIN QUAD	D	450	JANE STANFORD WAY, BLDG. 60	STANFORD	142-07-086
01-070	HUMANITIES - RELIGIOUS STUDIES	D	450	JANE STANFORD WAY, BLDG. 70	STANFORD	142-07-086
01-080	BUILDING 80 - MAIN QUAD	D	450	JANE STANFORD WAY, BLDG. 80	STANFORD	142-07-086
01-090	PHILOSOPHY	D	450	JANE STANFORD WAY, BLDG. 90	STANFORD	142-07-086
01-100	BUILDING 100 - MAIN QUAD	D	450	JANE STANFORD WAY, BLDG. 100	STANFORD	142-07-086
01-110	BUILDING 110 - MAIN QUAD	D	450	JANE STANFORD WAY, BLDG. 110	STANFORD	142-07-086
01-120	McCLATCHY HALL	D	450	JANE STANFORD WAY, BLDG. 120	STANFORD	142-07-086

https://maps-secure.stanford.edu/sims/campus_queries/address.cfm

SFA Asset Location

Sunflower Enterprise - Production 5.0.0.0 - 06/08/2016 (KKAehler@OF1PRD)

Action Edit Query Block Record Field Lookup Help Window

Maintain Inventory Assets - asmn2010 (Page 1 of 2)

Inventory Assets

UII None Captured

Other Identifiers (1) INV / 7109300

Maintain Locations - sacr2110

Locations

Quad 20 - PORTER DRIVE

BLDG-FLOOR 081-02 ROOM 2158 Leave Blank

Leave Blank

GPS 1 GPS 2 GPS 3

Acquisition Method PURCHASE User Fields*

Acquisition Cost* \$26,462.12 Acquisition Date 01/13/2016 Today's Date

Asset Condition 1 GOOD CONDITION Record Last Updated 06/08/2016 Due Date (PMO Use Only)

Activity Status IN SERVICE Flags* C Do Not Use

Business Unit VAAA - SCHOOL OF MEDICINE Owner STANFORD UNIVERSITY

Department XDCI - OPHTHALMOLOGY Accepted? Y DPA BARTLETT BARBARA 05519364

Custodian 04395877 Last Name* GOLDBERG First JEFFREY Mid LOL

User 09648622 Last Name* RUSSANO First KRISTINA Mid

Location* 20 - PORTER DRIVE_BLDG-FLOOR_081-02_ROOM_2158 Container Number

Document*

Do Not Use*

Global User Fields* 1213750_24697.96_2015_ALLOW

Add'l Information Commodity Comment / Picture / Attachment Re-Request Asset Configuration Asset Kit

The institutional mailstop assigned to the location, e.g. B2332-2

Record: 1/1

Recording and Updating Location

- Location accurately reflected at record creation
- Update the SFA record if location will change for over 30 days
- Off-Campus form is required if asset is to be in a location that is not in the University space inventory system (iSpace) but in the control of Stanford faculty or staff
- If the asset is loaned to another Institution, attach the loan document to the record and change to Off Campus Business Location Code and enter the physical address in the Global User Field



Off – Historic Campus

Stanford Space

Includes Leased buildings and remote University sites

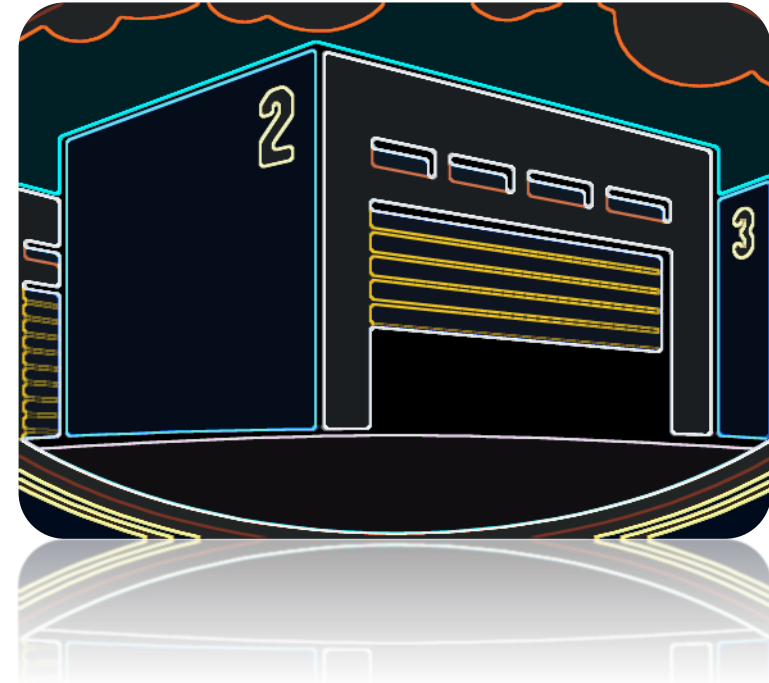
- Location is in the iSpace registry
- Quads for Porter Drive (20), Menlo Park (40), Redwood City (70), and Various Off Campus Locations(90)
 - Quad 90 Examples:
 - Stanford Boathouse = 90-435
 - 1050 Arastradero Bldg. A = 90-471R
 - 730 Welch Rd. = 90-925
 - SLAC & PAVA = Buildings 90-998 & 90-990
 - Room number should be noted in location detail field

Always use locations from the list of values

Storage

If an asset is to be in storage:

- Provide Justification for retention
 - Purpose
 - Storage Period
- Must be in a secure location
- Document all assets in storage




For Capital Equipment – note Storage Justification Retention information in Sunflower Record Comments and physical location/contact in Location Detail Field.

Non-Stanford Space

- If the asset is located at a business or private residence:
 - AND under control of Stanford personnel
 - Location not in space registry
 - In SFA, use Quad 90
 - Private Residence – 510E-99999_99999999
 - (Do not enter the physical address in SFA)
 - Private Business or Institution 550E-99999_99999999
- These assets require an Off-Campus Worksheet
 - Available on the PMO Website > Forms and Documents



Off-Campus Worksheet

 **Property Management Office**
Off-Campus Equipment Verification Worksheet

Custodian Information

Printed Name _____ Phone Number _____
Title _____ Email _____
Department _____ On-Campus Location _____
Signature _____ Date _____

Off-Campus Asset User

Printed Name _____ Phone Number _____
Department _____ Email _____
Off-Campus Location/Address (No PO Box) Include zip code:

Is this a private residence? Relationship to Custodian _____

Asset Information *(if multiple assets at same location, use secondary sheet)*

SU ID Tag Number _____ Manufacturer _____
Model Number _____ Description _____
Serial Number _____ Asset returned to campus? (Y/N) _____

Initial Form Created
Date _____ DPA Initials _____ Status & Condition _____

1st Annual Verification Performed
Date _____ DPA Initials _____ Status & Condition _____

2nd Annual Verification Performed
Date _____ DPA Initials _____ Status & Condition _____

PMO Website > Forms and Documents





Asset Recording Worksheet

 PROPERTY MANAGEMENT OFFICE Asset Recording Worksheet	
SU ID Tag Number _____	Taggable (Y/N) _____
Manufacturer _____	
Model Name (if any) _____	Model Number _____
Description (centrifuge, freezer, etc...) _____	
Serial Number _____	Purchase Order # _____
Acq. Cost & Method \$ _____	Date Rec. _____
Year Manufactured _____	Business Unit _____
Asset Owner STANFORD <input type="checkbox"/> FEDERAL <input type="checkbox"/> OTHER <input type="checkbox"/>	
Department _____	Dept. Org _____
Custodian (Last, First) _____	
User Name (Last, First) _____	
Location QUAD _____	BLDG _____
FLR _____	ROOM _____
Will the asset be used in a Service Center? (Y/N) _____	
Asset Photo (Y/N) _____	
<u>Global User Field Information</u>	
Additional Location Details	
Additional Asset Comments	

**Remember:
receipt to
record in 30
days!**

**Remember:
receipt to
record in 30
days!**

PMO Website > Forms and Documents





PMO-1000

Day Two

Please type your first and last name in the chat box. We will begin in just a moment.

PMO Management Outreach

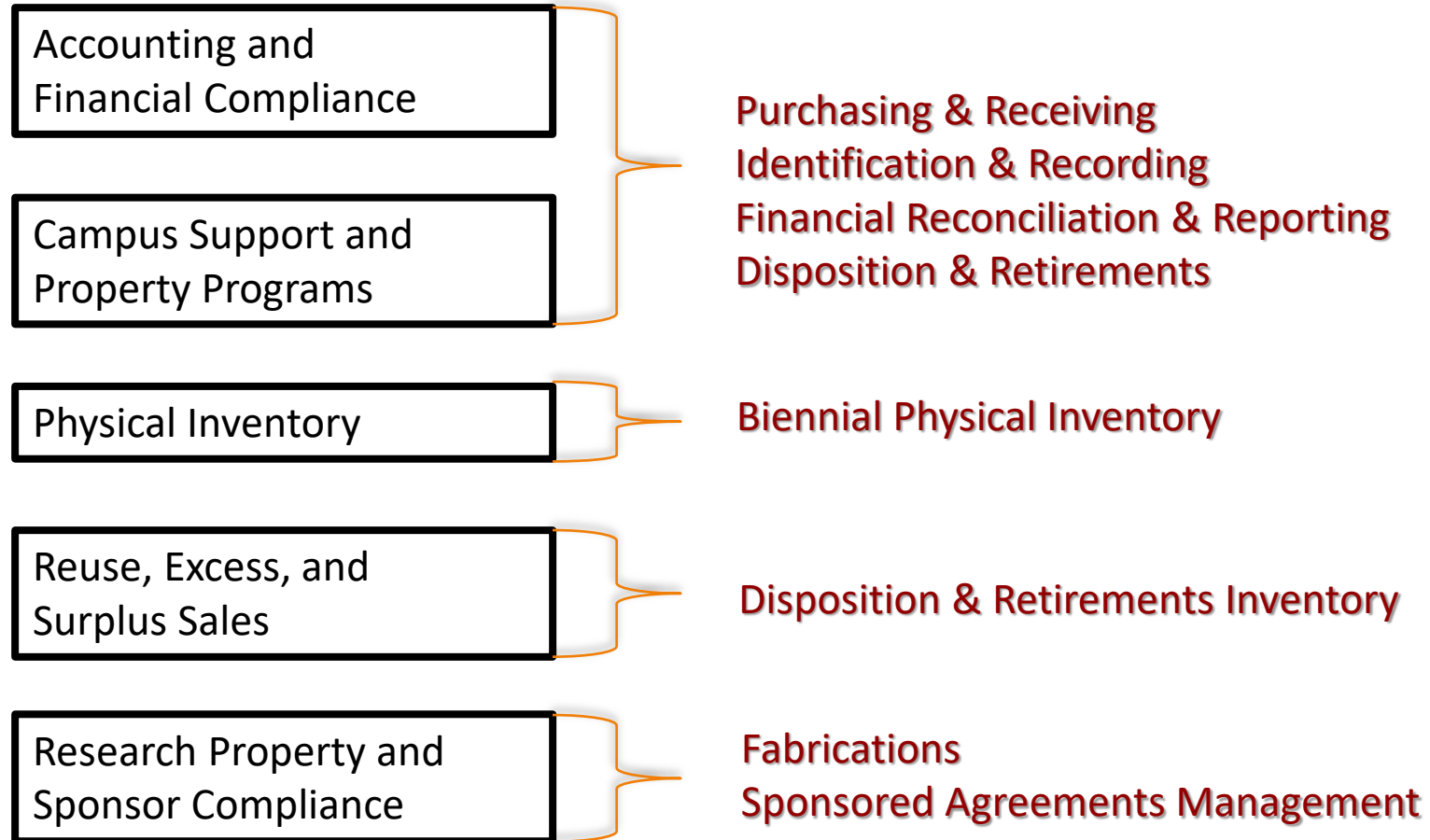
- Purpose of our outreach activities are:
 - Update departments with the current landscape of property management
 - Clarify roles, responsibilities, and expectations
 - Better understand campus needs, issues, and competing priorities
 - Share tools, resources and promote services available
 - Provide opportunity for direct feedback (both ways)
 - Increase visibility and awareness of key Property controls and associated risks
 - Highlight performance and share metrics
 - Identify potential improvements



Key Control Processes to Address Risk

PMO Teams

Key Controls



Key Roles in Property Management



- Asset Users
- Office or Lab Manager
- Faculty or Principal Investigator
- Department property Administrator (DPA)
- DPA Supervisor
- Associate Dean / Dean / AVP or Designee
- Property Management Office



- SPARC Home page
- About
- Authorities
- Getting Started
- Quick Links
- Help



Excess Request

Stanford's Property Management Office provides this application for electronic routing and tracking of excess requests.

DPA Directory

This directory is for obtaining contact information for Property Administrators (DPAs) throughout the University.

Sunflower Catalog Request

This application is provided for DPA to request new catalog combinations (model numbers) to be added to the database.

Pre-Purchase Screen

For use by DPAs to perform audit and review of acquisitions. Enter the resulting audit information in the comment field of the requisition for asset searches.

Tag Order Request

Stanford's Property Management Office provides this application for requesting Tagging Supplies Order forms.

ReUse Request

Stanford's Property Management Office provides this application to "advertise" usable items (Stanford surplus) for transfer to another department.

Capital Cost Transfer

This site is available to staff and students with a valid SUNet ID, and is used to highlight items available for sale through the Capital Cost Transfer (CCT) Application.

Capital Cost Transfer

The Capital Cost Transfer (CCT) Application provides a tool for Financial Administrators and Managers to track and manage capital assets.



Sunflower Enterprise

Demo's!

Sunflower:

- Creating a record "from scratch"
- Creating multiple records from one PO
- Tips, Tricks and Searches

Outgoing Loans

- When Stanford owned equipment is:
 - Being used in a Non-Stanford location

AND

 - Not in the possession and control of Stanford University personnel

Use an outgoing loan document rather than an off-campus worksheet
- Outgoing loan must demonstrate a direct benefit to the University
 - Loans to for-profit entities are generally disallowed and must be pre-approved by PMO

Always contact your PPM in the event of an outgoing loan. There are a number of issues to be reviewed prior to a loan being approved and generated, alert PMO as early in the process as possible.

Outgoing Loan Document – Stanford Lender

Property Management Office Outgoing Loan Document	
PMO Generated Loan # _____	Loan Period From _____ to _____
Lenders Information	
Stanford University Department _____	
PI Contact Name _____	Phone Number _____
Address _____	
Borrowers Information	
Institution/Company Name _____ Phone Number _____	
Contact Name _____	Title _____ Email _____
Address _____	
Loan Information	
Purpose of Loan: _____	
Location where property will be used (if different from above): _____	
Restrictions on Use (if any): _____	
Sponsor Approver's Name (if Sponsored Owned) _____ Date _____	
Please attach reference or contractual documentation/shipping information if applicable.	
Asset Information	
SU ID # _____	Manufacturer _____ Model Number _____
Name/Description _____	Serial Number _____ Owner _____
Acquisition Value \$ _____	[Is more than one item being loaned? (Y/N) _____]
If yes, please utilize space below or attach second sheet.	
Asset Information	
SU ID # _____	Manufacturer _____ Model Number _____
Name/Description _____	Serial Number _____ Owner _____
Acquisition Value \$ _____	
Property Management Office, 485 Broadway 3rd Floor MC 6025 Redwood City, CA 94063	

Property Management Office Outgoing Loan Document	
TERMS AND CONDITIONS	
<p>1. Borrower will:</p> <p>a. Assume all costs involved in preparation, handling, loading, disconnecting, transportation, and shipping insurance from and to Lender;</p> <p>b. Use the loaned property only for the purposes specified in this loan agreement, in compliance with US export control and trade regulations;</p> <p>c. Maintain and calibrate equipment in accordance with manufacturing specifications;</p> <p>d. Return the loaned item(s) in like condition as received from Lender, normal wear and tear excepted, and free of contamination, on or before the expiration date, unless the loan period is formally extended or the loan is terminated before the due date;</p> <p>e. Provide Lender evidence of liability insurance with limits not less than \$2,000,000 and evidence of property insurance for loss or damage with "The Board of Trustees of The Leland Stanford Junior University" to be included as an additional insured under both policies (property insurance not required on government loans). The certificate(s) of insurance are to be mailed to: Department of Risk Management, Stanford University, 505 Broadway, Stanford CA 94063</p> <p>f. In case of loss or damage of the property loaned, report such loss and reimburse Lender at the current price of replacement or repair (including cost of loss of use), and</p> <p>g. Agree to defend, indemnify and hold harmless Lender (Stanford University) and its officers, employees and agents against any and all liability, loss, damages, claims and costs arising from Borrower's use or possession of the loaned property.</p> <p>2. The above property shall not be modified, loaned, exported, re-exported or transferred to a third party without the written permission of the Stanford University Property Management Office (PMO)</p> <p>3. Borrower will verify in writing to Stanford Property Management Office custody, use and condition of equipment annually and permit periodic inspection of loaned property by Lender or its designee upon request.</p> <p>4. Borrower will immediately report to Stanford Property Management Office any incidents of loss, damage or destruction of loaned equipment.</p> <p>5. Stanford University will pass on all FLOW DCMN responsibility to Borrower. Title to the property will rest with Stanford or its Sponsor in accordance with the prime agreement. Lender reserves the right to cancel the loan and to recall the loaned property upon a 10 (ten) day notice.</p> <p>Agreed to and accepted by (Please print or type—except signature):</p>	
Approvals	
SU Loan Initiator _____	Signature _____ Date _____
Borrower's Authorized Representative _____	Signature _____ Date _____
Department Property Administrator _____	Signature _____ Date _____
Property Program Manager or PMO APPRV _____	Signature _____ Date _____
Property Management Office, 485 Broadway 3rd Floor MC 6025 Redwood City, CA 94063	

Outgoing Equipment Transfers

Transfer of equipment to other institutions may require considerable effort, and certain information will be requested from the DPA. A complete list can be found in the Property Manual Chapter 4.2.

The following apply in all cases:

- Itemized list of equipment transferring
- Name and contact information for receiving institution
- Original funding sources(s) of the equipment(federal, other)
 - Are there transferring grants with the equipment?

Note: Sponsor owned transfers must be facilitated by PMO, contact your PPM.

Export Controls

- When traveling with equipment:
 - Domestic travel
 - International travel (including Canada)



Research equipment leaving the country MUST be pre-approved, including laptop computers for research personnel.

- ✓ Certification needed even if no export license is required
- ✓ Personal computers for administrative, non-research use are not restricted

Steve Eisner, Export Control Officer

Steve.Eisner@Stanford.edu

http://www.Stanford.edu/dept/DoR/exp_controls

See Decision Tree!

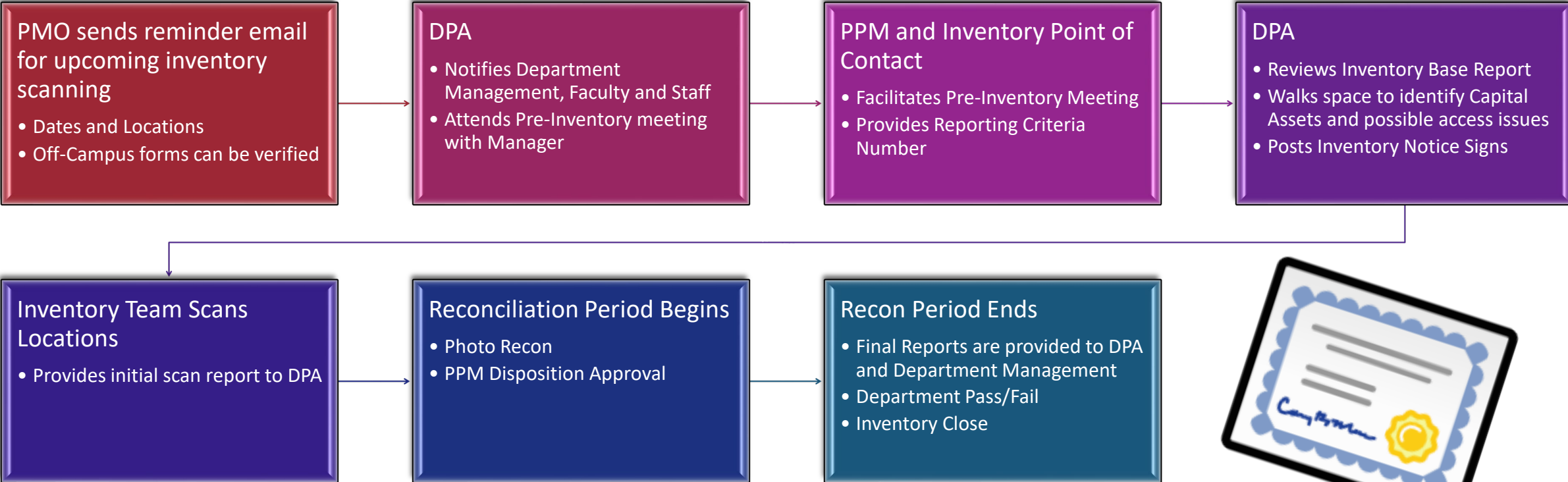
Physical Inventory

- Purpose
 - Verify accuracy of property records
 - Validate University Financial Reports
 - Check “overall health” of property system
 - Data posted in Sunflower Database, reports
- Frequency
 - Biennial inventory required
 - 98% minimum ‘location’ rate to pass
 - Departmental or Sponsored inventories as needed



You will be notified well in advance of your department’s scheduled inventory and provided with additional information at that time.

DPA Inventory Process

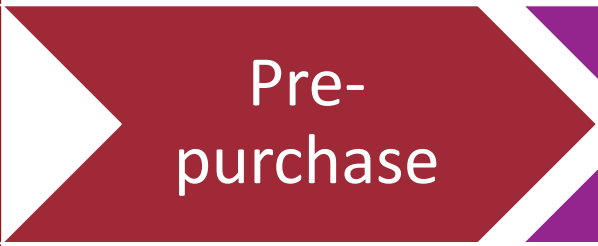


Vehicle Documentation

All vehicles must be recorded in Sunflower

- Fleet Garage processing
 - New Vehicle Entry Form provided by Fleet Garage
- List vehicle ID# in Global User Field of asset Record
- Use Department Administrative Office for record location





Equipment Excess Request

To have items collected/removed from your department for disposal

Excess Request generated in SPARC

- Tagged items and non tagged items on separate requests
- Tagged items will route to primary DPA for approval

Excess Request is received by Surplus

- A PSSI work order for removal of refrigeration equipment is required. DPA to include WO number in the SPARC request
- Please note if you have a 3rd part mover on ER

Pick up is scheduled

- Please note that scheduled date is only an approximation, and actual pick-up may be a day before or later

Reuse

Reutilization and re-purposing of property is a priority at Stanford. Items in operable condition that are no longer needed should be made available to all University departments.

- ReUse Website (SPARC)
- Sustainability Lab Share Events
- Interdepartmental communications
- Furniture Reutilization Program



Furniture Disposal Process

- Furniture removal should be coordinated with the assistance of Steven Magee, Reutilization Specialist.
- **NO SPARC Excess is needed for furniture disposals**
- Small quantities or small projects (<10 items or a large group of matching chairs:
 - Contact Steven Magee
 - Send photos to him to decide what should go into the ReUse Program
 - Arrange move of furniture to warehouse/PSSI as appropriate via UG2 – a work order is needed through Building Grounds Maintenance (BGM) website or through a 3rd Party mover
- Large quantities or projects (2 -3 offices or more)
 - Contact Steven Magee
 - Arrange for a walk-through for evaluation
 - Steven Magee will tag the furniture to go to ReUse
 - Arrange with UG2 or 3rd Party movers
 - If using a 3rd Party mover, please coordinate with Steven Magee for delivery
 - A PSSI workorder is needed for broken/unacceptable material

Refrigerants - FREON

- Any equipment which uses Freon as a coolant can only be handled for disposal by PSSI
- A work order is required, available on the BGM website. Select request type "Customer Funded"
- The work order must be originated by the Department and the number entered in the SPARC, which will speed the process
- PSSI will contact the primary contact on the SPARC request to coordinate pick up



Computer Disposal

- Computers and data storage devices require special handling to ensure information security
 - Proprietary data files must be removed by user prior to excessing a computer. This process is an important risk mitigation for the University.
 - Apple products also require the user to remove their iCloud account and unenroll from JamF and Remote management.



No Pick-Up Equipment Excess

Transfers to outside institution

Returns to manufacturer/sponsors

Trade-in for new model

Property record elimination


Theft

Lease/Loan return

Sale

These excess requests must be completed in Sunflower, via template - contact your PPM!


Disposal Informational Page




Surplus Property - Disposals

- Office of Sponsored Research - Pre Award
- Office of Sponsored Research - Post Award
- Sponsored Receivables Management
- Client Advocacy & Education
- Cost and Management Analysis
- Property Management Office
 - Property Management Manual
 - Capital Cost Transfers
 - Team Members
 - Campus Support Team
 - Surplus Property Sales
 - Disposals

Key Contacts

Surplus Property Sales Manager
Alex Perez
650.723.3001
[Email](#) 

Assistant Surplus Property Sales Manager
Jimmy Baca
650.723.3001
[Email](#) 

Disposition is the process by which property owned by or otherwise accountable to Stanford is permanently removed from active University records. When assets become excess to the needs of the University, or the sponsored project under which they were acquired, they must be declared excess and the disposition process initiated. Timeliness in beginning the disposition process is a key to maximizing return on investment while minimizing unnecessary costs associated with the retention and management of the asset. It also mitigates the risk of potential misuse, unauthorized disposition, or theft.

- Topics Include
 - Disposal Preparation
 - SPARC vs. Sunflower Excess Requests
 - Definitions
 - Examples
 - Importance of Ownership Review
 - Special Handling
 - Computers and Computing Devices
 - Serial number reminder
 - Furniture
- ora.stanford.edu >> Property Management Office >> Surplus Property Sales >> Disposals

Excess Reminders

Attempt to
Reutilize on
SPARC ReUse Site

Complete
sanitization prior
to excess

Clearly identify
items to be
collected –
segregate and flag
with excess label

Contact Surplus Property with Questions





Online Systems and Reference Tools – To help you do your job!

- SPARC (Stanford Property Administrators Resource Center)
 - Various property related portals
 - Quick Links
 - Property Manual, User Guides, FAQs, Forms and Documents
- OBI Reports
 - General reporting and consolidated data
- Administrative Guide
 - University Policies

PMO Unmatched Monitoring

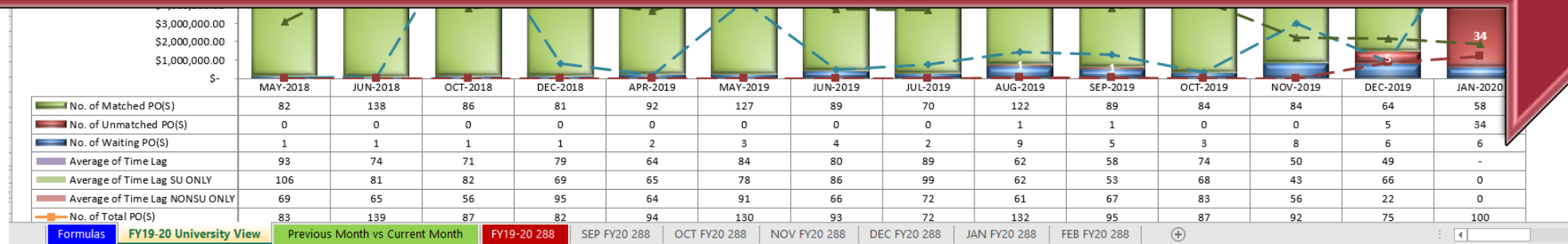
A process to determine invoice lines in FA Mass Additions, with no corresponding record in Sunflower and Sunflower records created, but not reconciled in Oracle FA. This correlates to the timely recording of assets.

OUTSTANDING "UNMATCHED" BY STATUS AND CALENDAR MONTH																		
Values													% Dollar Amount			% By PO Count		
GL Period	Waiting (\$)	Unmatched (\$)	Matched (\$)	No. of Waiting PO(S)	No. of Unmatched PO(S)	No. of Matched PO(S)	No. of Total PO(S)	Average of Time Lag NONSU ONLY	Average of Time Lag SU ONLY	Average of Time Lag	% Waiting	% Unmatched	% Matched	% Waiting	% Unmatched	% Matched		
MAY-2018	18,199.00	-	3,089,846.00	1	0	82	83	69	106	93	1%	0%	99%	1%	0%	99%		
JUN-2018	56,396.00	-	5,594,964.00	1	0	138	139	65	81	74	1%	0%	99%	1%	0%	99%		
OCT-2018	8,499,007.00	-	3,835,933.00	1	0	86	87	56	82	71	69%	0%	31%	1%	0%	99%		
DEC-2018	820,000.00	-	4,324,004.00	1	0	81	82	95	69	79	16%	0%	84%	1%	0%	98%		
APR-2019	160,327.00	-	3,689,814.00	2	0	92	94	64	65	64	4%	0%	96%	2%	0%	98%		
MAY-2019	4,214,550.00	-	5,328,029.96	3	0	127	130	91	78	84	44%	0%	56%	2%	0%	98%		
JUN-2019	485,836.45	-	3,769,857.53	4	0	89	93	66	86	80	11%	0%	89%	4%	0%	96%		
JUL-2019	771,022.00	-	3,705,313.00	2	0	70	72	72	99	89	17%	0%	83%	3%	0%	97%		
AUG-2019	1,437,278.00	26,592.00	6,248,392.00	9	1	122	132	61	62	62	19%	0%	81%	7%	0%	93%		

PMO downloads University wide 288 Report and sorts by Department

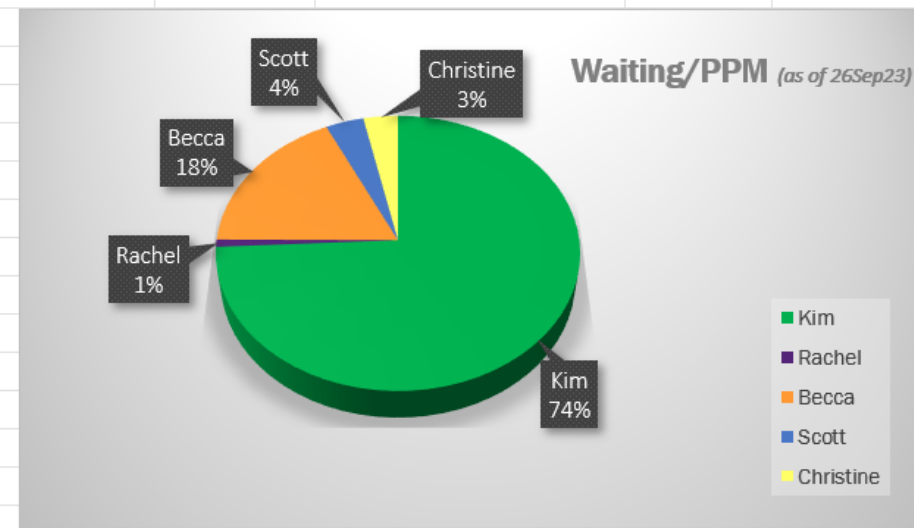
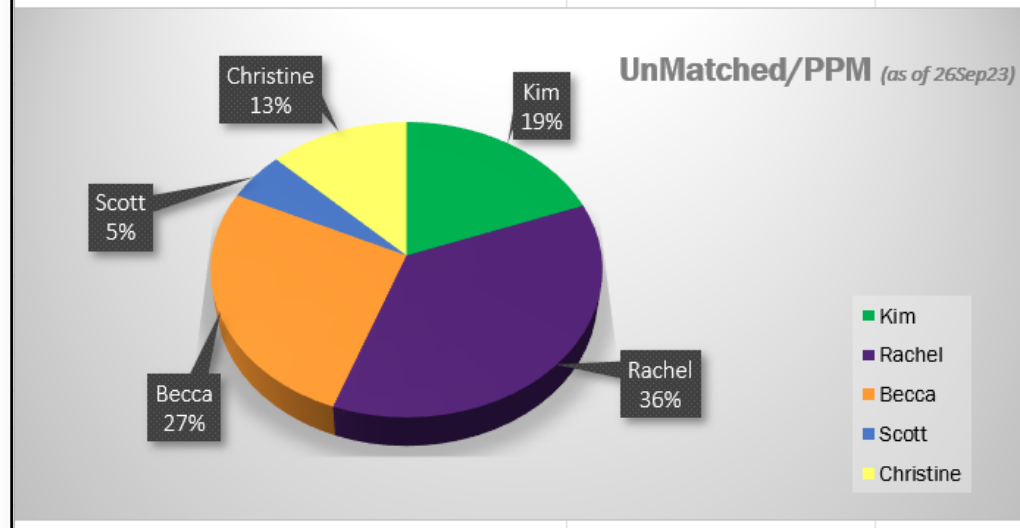
PPM sends email to Departments that have new unmatched POs

DPA uses this information to tag and record Assets in SFA within the 30 day timeline



Financial Impact – Unmatched Reporting

Total Amount UnMatched by PPM		Total Amount Waiting by PPM	
Kim	\$ 6,168,434.00	Kim	\$ 28,937,339.00
Rachel	\$ 11,612,957.00	Rachel	\$ 332,500.00
Becca	\$ 8,473,815.00	Becca	\$ 6,968,699.00
Scott	\$ 1,702,506.00	Scott	\$ 1,441,488.00
Christine	\$ 4,044,390.00	Christine	\$ 1,309,261.00
Total UnMatched	\$ 32,002,102.00	Total Waiting	\$ 38,989,287.00



Training and Communication Resources

- **Property Policy and Systems classes - STARS**
- **Property Forums (PMO-3000) – 2X/Year**
- **Refresher (PMO-2000) – 2X/Year**
- **CCT Overview (PMO-5010) – self paced**

- **Stanford DPA SLACK Channel**
- **PMO Communications – DPA email list**
- **NPMA Higher Education and Research Chapter – National Property Management Association**
- **Your Property Programs Manager (PPM)**



Who would
you contact
if...

- You have a question about Capital Equipment Expenditure Types
- A faculty member is leaving Stanford and wants to take “their” equipment
- Your Department is given a grand piano
- A manufacturer wants a faculty member to use a piece of equipment for research and let them know how it works
- A faculty member wishes to sell a piece of their equipment to another University

YOUR PPM!

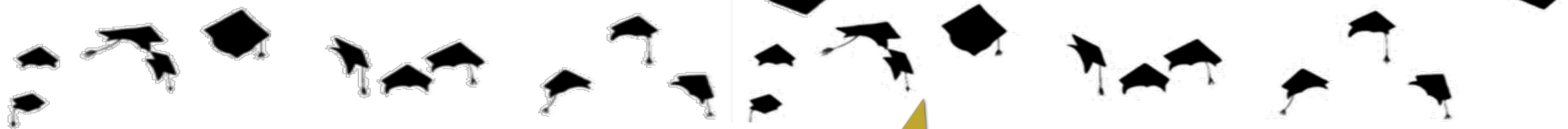
You as a Communicator and Facilitator:

- Let your Department know who you are, where to reach you and WIIFT (What's in it for Them!)
- Set up communication strategies that work for your area
- Be visible
- Distribute Valuable Information
- Know your job
- Be assertive
- Use your PPM as a resource





1. In the next day or two, PMO will grant you access and authority for all DPA Property Applications (Sunflower, SPARC, BI Reports, Department Google Doc)
2. Please login and confirm your access (If you have any issues, please contact your PPM)
3. Review Department Google Doc – Confirm access, edit as needed



You did it!
Congratulations

- The DPA role is very important to Stanford
- Be proficient and be visible
- Keep your supervisor informed about your property activities and duties
- If you're not sure, ask your PPM - we're here to assist you!

