



# IT Asset Management Policy

## Overview

This document informs staff about policies regarding Information Technology Asset Management. This policy established and enforces technical and administrative controls to support asset management, both in internal operations and within facilities across the District. This is an evolving policy and will be updated as needed. If you have any questions or concerns relating to this policy, please discuss them with your supervisor, manager, or director.

## Background

Portland Public Schools' Information Technology (IT) Department is charged by District Leadership with the ongoing management of technology assets and the efficient and accountable use of the public funds these assets represent. An Asset Management policy allows the District to:

- Make informed IT planning, procurement, and investment decisions
- Calculate IT asset value and understand the total cost of ownership of those assets
- Manage the acquisition, maintenance, and decommissioning of key asset types
- Monitor compliance with IT standards
- Allocate support resources efficiently and effectively
- Secure and protect IT assets

## Definitions

**Asset** - Physical technology and licensed software (commercial off the shelf, internally or 3rd party developed) used for curation, creation, or consumption of digital content, network/internet communication, projection, display and magnification, document production, or network and data center infrastructure with expected lifetime of greater than two years. All assets acquired through the expenditure of District general fund, grant fund, federal program, Capital Fund, Student Body Funds, PTA funds, or donations of material or other means are subject to this policy.

**System of Record** - Software system designed with the express intent of identifying point of origin, acquisition price, funding source, and identifying characteristics of an asset. System will be updated over the lifecycle of the asset and will report on disposition/location, responsible party, changes in disposition over time, age/condition, and eventual disposal of assets individually and across the District. Upon implementation, system of record for this policy will be the PeopleSoft Enterprise Asset Management Module.

**Responsible Party** - Staff member, Program, or School to which assets are assigned. Within physical locations or programs where assets are pooled, one single individual, either the building principal or program director will be listed as the responsible party for the asset. The IT Department and Chief Information Officer shall be the default for this designation unless otherwise assigned.

**Technician** - Individuals delegated authority by the Chief Information Officer with authority to purchase, receive, and transfer ownership of an asset whether for deployment, maintenance reclamation, refurbishment, or disposal.



## Acquisition Standards

The IT Department has established and published, within the District and to the public, technology standards from which all assets as defined within this policy are purchased, leased, acquired via donation, or any other means.

It is the responsibility of the IT Department to coordinate with related departments, programs, and schools to enforce this policy and standard, as well as provide instruction to District staff on its use.

This standard encompasses any asset as defined in this policy. Device standards are reevaluated on a regular cycle by IT Department staff with the inclusion of related stakeholders where deemed appropriate. Standards for individual computing devices including but not limited to workstations, laptops, projectors, document cameras, speakers, mobile devices, tablets, and peripherals for those systems.

Wherever possible, asset standards will take into account total cost of ownership of the technology including replacement parts, maintenance or replacement frequency, and energy consumption.

## Acquisition Processing

Funds based acquisition of any asset will take place via purchase order originated with the consent of and processed by the IT Department via processes documented on the IT website and communicated to District staff annually.

Donation of asset or funds will be processed via processes documented on the IT website and communicated to District staff annually.

Assets will be received directly by the IT Department or third party designee and immediately tagged with a District asset tag as well as entered into the system of record by a technician. No asset will be exempt from processing and tagging, with the exception of large one-time volume orders, all assets will be processed within three (3) business days of receipt.

District assets acquired by means not in conformance with this policy will be subject to discovery and review during scheduled District asset auditing and additional costs may be incurred for inventory, tagging, and software licensing for endpoint protection and device management to be paid by the responsible party.

## Transfer of Assets

The transition of an asset between responsible parties shall only occur when facilitated by a designated technician. Though the technician may not always physically take possession of the asset for transfer, they are solely responsible for making entry into the system of record for that transfer.

A digital receipt indicating asset identity, serial number, location of transfer from and to, responsible party, and date transferred will be signed by both technician and responsible party when assets are transferred by the IT Department including:

- Initial deployment
- Asset Maintenance when the asset must be physically relocated to central office or manufacturer



- Collection and redeployment due to building/program relocation
- Recovery in cases of theft/loss
- Collection for disposal

This electronic receipt will be attached to the change event as entered in the system of record.

Assets for which the responsible party is the IT Department for any length of time will be physically maintained within the service desk area at the District office for short-term maintenance or processing. If an asset is the responsibility of the IT Department and is not actively in use or deployed within the district for a period greater than one week, it will be stored in a designated locking facility within the district warehouse.

No assets will be transferred into or out of the designated locking facility within the district warehouse without entry being made in the system of record.

No asset will be transferred from the responsibility of the IT Department without digital receipt.

## Disposal of Assets

Assets that no longer conform to standards for support whether due to quality and usability, damage, or material surplus will be identified and tracked by technicians in the system of record whether reported by Responsible Party via help desk ticket, or directly in the system of record.

Such assets will be stored in conformance with standards and practices outlined for environmental protection and workplace safety in a designated locked location within the location acting as responsible party.

The District contracts with a company to provide eWaste services. That company conforms to materials handling requirements which are evaluated for information security, environmental safety, and local economic impact.

When disposal is scheduled the eWaste company will provide PPS IT a record of the final transfer of each asset to a disposed status. The technician will enter the disposed status into the system of record within three days.

## Loss and Theft of Assets

Assets that are no longer under the control of a Responsible Party and transfer has not been documented to a disposed status will be considered lost or stolen. Responsible Parties are required to follow IT Policy regarding theft and loss as listed on the IT website and communicated to district staff annually.

Assets that are not recoverable will be disposed of within the system of record using a theft or loss category depending on the related event.

## Support and Management of Assets

Each asset represents significant investment of public funds, and it is the direct responsibility of the IT Department to ensure this investment is protected and returns value to the District.



It is within the purview of the IT Department to define standards for supported assets within the District and take action to ensure all assets are maintained and conform to these standards. Annually, the IT Department will review the disposition of assets within the district and identify those that no longer conform to our standard and will retrieve/replace those assets for either refurbishment or disposal.

Conditions for non-conformance to standard include:

- Incompatibility with District infrastructure platforms, domain, device management, or network
- Inoperability with District adopted software platforms, tools, or curriculum
- Age of device
- Processing capacity or performance
- Energy consumption

## **Auditing of Assets**

The IT Department will sponsor an independent third party audit of the system of record against asset disposition within the District as needed, but with no less frequency than every three years.

This audit may occur in geographically aligned phases over the course of the defined three year period with no responsible party or facility undergoing audit with a frequency less than every three years.

Third party auditor will be selected by a public procurement process and shall perform no more than two consecutive audits of any facility or responsible party.

This audit will consist of the completion of a detailed scope of work resulting in thorough refresh of asset disposition, and identification of deficiencies within the system of record which will be corrected by designated IT Department resources.

Assets discovered in this audit that have not been acquired in accordance with this policy could result in responsible parties incurring costs for tagging, inventory, and software licensing for endpoint protection and device management to be implemented by the IT Department and billed directly to the responsible party within the fiscal year of discovery.