



# Breaking Through The Chaos.

TECHNOLOGY & BUDGET MANAGEMENT IN **BIG 10** UNIVERSITIES

CASE STUDY . TECHNOLOGY & BUDGET MANAGEMENT IN **BIG 10** UNIVERSITIES



## Introduction

Large, 4-year universities are undeniable pillars of innovation and cutting-edge research. Each year, huge sums of money are devoted to capitalizing on shared technologies, equipment & assets that make this work possible. When leveraging technologies at scale, the quagmire of managing assets becomes exponentially problematic.

For our largest customers, that couldn't be closer to the truth. With over 90,000 students, faculty and administrative staff, the school is an ever expanding, complex maze of classrooms, academic buildings, lab spaces and research facilities.

The puzzle: How do you manage and track the thousands of pieces of fixed and circulating equipment? How do you know when an asset requisite could be met by existing inventory? How do you know when an asset needs to be decommissioned? And did each item serve its intended need?

And before you even get that far, how do you efficiently acquire the funding to budget for the needs of a massive inventory covering hundreds of spaces? With bureaucratic roadblocks and decentralized colleges and departments operating on their own schedule, it sounds nearly impossible. For one savvy asset manager, the key to success is harnessing WebCheckout to manage the Chaos.

## The Challenge

The technology services team is focused on supporting the instructional technology used the by the College serves over 15,000 students. The majority of this equipment is installed in classrooms as fixed equipment but there is also a loan pool allowing faculty, staff and students to check out equipment and items to support their academic goals.

Before using WebCheckout, the technology services team was having trouble managing these assets and ensuring they had the funding in place to replace pieces of technology that no longer work properly or were sorely outdated.

With items switching locations and being attached to different spaces, the team was torn between tracking the location, usage and availability of each rooms technology. With so many spaces to manage and individual components being replaced at different times, it was hard to keep track of which spaces were in need of an upgrade or replacement.

"It seemed like we were asking for money and then by the time we

actually got it we had other priorities or other rooms became necessary to upgrade" said the asset manager. "Fixing others and then asking for money to do the same room again. The financial folks were like 'didn't you just ask for money to replace this room last year. Why are you asking for money to replace the same room again?'"

And plans change throughout the course of the year, which means the items and priority of technology replacement changes too. It was important to their team to have an organized system in place that helped communicate their budget needs more effectively and capture a consistent record they could fall back on throughout the year.

In 2015, conversations started with the WebCheckout team to see how they could use their solution to meet these challenges head on.

Providing a long-range picture of when finance would see additional budget requests and an estimate for the request amount quickly proved invaluable in the budgeting process for the entire tech services team.

"It stemmed from uncertainty at the college level of when to refresh rooms and how frequently equipment needed to be replaced. It was very disjointed between how often the general-purpose classrooms were being paid attention to versus some of the departmentally owned spaces."





“They talked about attaching a life-cycle to the asset itself and using that item level information to create a big picture --- and come up with generating a dollar value that we want to ask for in our budget for just replacing existing gear, along with a projection for future budget requests 1, 2 and 3 years out.”

### The Solution

With WebCheckout, our clients tech services team was able to implement a system for pulling their equipment replacement dates based on a 4/8/16 year life cycle. They standardized and categorized what types of items would be in each year's category.

**Life cycle Equipment Categories:**

**4 Year Lifespan**  
displays, televisions, video projectors, computers, monitors (rapidly evolving technology)

**8 Year Lifespan**  
control systems (things that route signal and switch between sources) and most audio equipment

**16 Year Lifespan**  
speakers, motorized screens, carts (items with no or little change over time)

“There a couple of exceptions,” the asset manager explained. “Like loan equipment, a couple things have a shorter lifespan because we send them out with students & staff. Items take some abuse in a different way with students & staff than in the classroom setting.”

Over the years, their team has used WebCheckout to solidify their budgeting process which now operates like a well-oiled machine. They populate their asset replacement dates in WebCheckout based on the life cycle categories and pull a report of all of their assets (which includes their target fiscal year for replacement). A review is then conducted to determine if the item really needs to be replaced and if it's located in a space where their team is planning to replace an entire set up.

Ultimately the resulting data is what their asset manager reports to their director, who will acquire approval from university leaders for the budget funding they need to maintain their inventory.

On top of budgeting needs, they recognize the value WebCheckout provides for the individual equipment stewards like the loan desk. “They can use it as a reminder of what they've planned for and not lose track of what they said they were going to do that year,” said the asset manager.

Whether it's for planning, budgeting, or the day-to-day job of managing equipment tracking, scheduling and reservations, WebCheckout helps their entire team stay on top of their

ever-growing inventory of fixed and circulating equipment.

And now, with the changing requirements across university campuses to accommodate distanced learning, it's more important than ever to have the right system to handle valuable technology assets.

In their words, “We can't imagine if we didn't have such a robust system for receiving, for processing, for tagging and loaning equipment.”

It can be a struggle to ensure your institution has the appropriate equipment and staff necessary for the job. Become the master of your technology inventory with WebCheckout. A robust system that makes it simple and easy to track, manage, and maintain the equipment and personnel you need to focus on your customers.

**For more information visit [webcheckout.net](http://webcheckout.net)**

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