

**NOAA Personal Property
Status Meeting with Line, Staff, and Corporate Offices
June 3, 2010 at 11:00 am**

Attendees and Telecom Participants

AGO
CAO Rosa Sorrell
CFO
CIO Vanessa Rini-Lopez Andrew Venaglia
GC
NESDIS Bernadette Foreman
OMAO Beth Downs Candi Myers
Harrie Cherry
NMFS Carol Ciufolo Rhonda Perry-Burgess
NOS Sloane Strother
NWS Jan Evans Yvette Garnett-Singleton

OAR Marie Covard
USAO
WFM Gail Perry

Finance Heather Potter
Mark Miller

LD/PPMB
Joy Taylor Obadiah Aguliar
Judy Mickens-Murray Edwin Lewis
Tom Deckard Robin MacMillian
Ken Morrow Debbie Pickerign
Larry Oates Ken Morrow
Michelle Ross Larry Oates
Melissa Nelson Holly Turri

RPFLO Mary Ann Whitmeyer

BranCore Technologies
Paul Myers
Glenn Davis

Cotton & Co
Ralph Newsome
Meg Gardner Lu Zhao

Agenda:

PMO CALENDAR
OPEN CWIP PROJECTS
BUBBLE CHART – DEPARTMENT OF COMMERCE
UPR
CAPITALIZED ASSETS TO BE DISPOSED
ADDS EDITS INTERFACE PROCESSING TIME
PHYSICAL INVENTORY – 1ST, 2nd AND 3rd QTRs
REMINDER
OUTSTANDING PPMB ACTIONS

Action Items:

1. The Annual Capitalized Physical Inventory Certification is due 7 June. In 2008, Bill Broglie issued a memo that Capitalized Property Inventories Certification be certified by the DA or the DDA. That responsibility can be delegated to the office of the CFO. Judy said that she would circulate the memo and Joy said that she would circulate a memo with further clarification.
2. There were complaints that the Line Offices were not warned of the changes that would be associated with the move of the server. They had been told that the transition would be seamless and now they are finding out that a VPN is required to give their employees access. Judy said that detailed information was distributed. Candi asked for the distribution list because many OMAO employees didn't receive that information. Judy said she would provide that list.
3. There has been some resistance expressed by Custodians within the Line Offices over the generation of the Corrective Action Plans. Custodians should understand that the completion of their property responsibilities is part of their performance plan and their managers should be assessing the completion of their Property elements in their performance evaluation. It was suggested that this could be encouraged if this direction came from Bill to the CFOs. Judy said that they would raise this issue in their next meeting with Karl, the new Director of the Logistics Department.

Meeting Minutes:

Judy Mickens, Branch Chief, Personal Property Branch, opened the meeting.

PMO CALENDAR

In general, the PMO calendar has been well received. If Line Office personnel notice items are missing, please send an email to Meg with a copy to Judy.

OPEN CWIP PROJECTS

The purpose of the graphic is to communicate PPMB's understanding of Open CWIP projects. If the Line Office personnel see that something is incorrect or is missing, please communicate that information to PPMB.

BUBBLE CHART – DEPARTMENT OF COMMERCE

NOAA still has an open issue with the critical elements task. PPMB must write the letters for the Line Office personnel to certify completion and deliver that documentation down to the Department. Our goal is to have this done by Monday

UPR

The UPR has risen, but that can be attributed to the rise in purchase transactions. The Aged UPR shows a rise in the 30-60 and the 60 – 90 day-old records. This may be attributed to the increased transactions as inventories were processed. If the level is a significant concern, you should have been contacted by your Line Office Rep.

It was mentioned that one of the conversations at the off-site was that PPMB used to distribute lists of older UPR records, records over 90 days. Judy responded that much progress has been made and that she didn't want to "beat up" on people when they are providing a good-faith effort. The metric shows the progress with resolving older records and the Line Offices should continue to chip away at it.

UPR Certification Process

We're still having a problem getting full compliance. This metric is a measurement for PPMB. Line Offices need to submit certifications for those months in where certification has not been received. Joy mentioned that Line Offices simply need to certify that they are aware of the status of their records in the UPR and are working to resolve the differences, regardless of whether the records indicate high or low levels.

CAPITALIZED ASSETS TO BE DISPOSED

We are trying to keep the Line Offices informed of the status of these transactions because of the importance of the timeliness issue.

CAPITALIZED ASSETS IDENTIFIED FOR BOR REVIEW

There has been some resistance expressed by Custodians within the Line Offices over the generation of the Corrective Action Plans. Property Representatives should contact PPMB if these issues need to be raised above their level of authority to get compliance.

Judy suggested that one of the options to consider is to replace those Custodians who are not meeting their responsibilities. They should understand that the completion of their property responsibilities is part of their performance plan. Their managers should be assessing the completion of their Property elements in their performance evaluation.

Candi suggested that this could be encouraged if this direction came from Bill to the CFOs. Judy said that they would raise this issue in their next meeting with Karl, the new Director of the Logistics Department.

Candi asked whether the corrective action plan could consist of the implementation of existing policies that were not being followed in the past when the items were lost. Judy responded that the correction action plan was a requirement of the BOR. Candi asked about the old disposal actions that occurred before the recent efforts were made to implement correct disposal procedures. Larry suggested that a memo that references the newly drafted plan might suffice. Judy thought that such exceptions should come from the direction of the BOR.

Judy discussed the status of the items listed in the graphic. PPMB is still waiting for instructions from DOC regarding the processing of the last record assigned to OAR. Judy offered to provide Marie a written effort of the efforts made to date concerning the status of the item.

Web Site

A question was raised concerning the status of the BOR instructions on the Web Site; have they been updated? Judy responded that Ken is massaging the information one more time and is hoping to have the material approved by Joy and up on the web by the next day.

Joy stated that neither she or Judy now control the web site; it is controlled by a webmaster in another organization. As such, Joy cannot guarantee the currency of the material on the web site. The Line Offices will need to rely on the instructions from PPMB staff to get the most current direction.

Jan asked whether the changes being made are also being made in the new web site. Judy responded that, although the new web site has not yet been launched, changes are being made to both versions.

ADDS EDITS INTERFACE PROCESSING TIME

The rise in some of the results for may be ascribed to the efforts to clean up some of the older transactions.

PHYSICAL INVENTORY – 1ST, 2nd and 3rd QTRs

Larry thinks that all is going well and that Line offices are being responsive. Judy has received a report of custodial areas that have incurred loss rates greater than 5% and has instructed the LO Reps to contract their PMs concerning those areas.

REMINDER

The Annual Capitalized Physical Inventory Certification is due 7 June. In 2008, Bill Broglie issued a memo that Capitalized Property Inventories Certification be certified by the DA or the DDA. That responsibility can be delegated to the office of the CFO, on down to the Deputy CFO. Judy said that she would circulate the memo and Joy said that she would circulate a memo with further clarification.

Concern was expressed that the distribution cycle does not include the PM.

The question was asked, “Why are signed certifications are needed for areas with no assigned capitalized assets?”. Judy explained that capitalized assets have been ‘found’ through inventory in organizations that have not previously reported capitalized assets and that PPMB wants each organization to examine its holdings with the expressed purpose of identifying any unreported capitalized assets. Certification indicates that a search was conducted.

FY 2010 Deferred Maintenance Data Call is due 21 June.

Responding to Candi’s Notes

1. The status of the national disposal plan and a time line for implementation (same from May meeting)

Michelle has been working diligently on this and a SOW was submitted to AGO 10 months ago. Progress has been slow.

2. status of the follow-up work groups and actions from the February 2010 PM offsite, specifically (same from May meeting):
 - o implementation/roll-out of transfers to the LOs and a time line for implementation
 - o implementation/roll-out of adding non-capital assets into sunflower to the LOs and a time line for implementation

Same answer as Question #1: PPMB has some five procurements in AGO and is backlogged on several initiatives.

3. “timely processing of new assets (15 days) - at the last meeting, you stated you were going to create a sub-group (with someone on it who has bankcard experience in downloading data) to look at what a reasonable amount of time is to get assets into Sunflower”

This initiative fell off Judy’s radar screen but is now back on. She will assign it to someone to make sure it gets done.

4. conflicts in PPMB's guidance on website for property performance plan element weights (5% vs. 15%) and when guidance will be corrected for consistency and posted to website

The web site reflects the guidance that was put out in 2006, 5% in demonstration and 15% in tier. In April 2010, WFM put out guidance that was a flat 15%. Judy is trying to meet with Jennifer Hyatt to clarify the matter before changing the language on the web site. It makes sense now that it should be 15%.

Joy related that she is going to speak to DOC about the fact that this should be an HR issue and not a PPMB issue.

5. status of instituting property "contacts" again - this request has been out there for over 6 months

Joy and Judy have not been able to make the right argument at the bi-monthly PMO meeting to convince them of the need to reinstate Property Contacts. The Department is reluctant to give the Contacts the same rights as Custodians. The other Agencies do not understand the issue because they do not have the volume of assets that NOAA tracks. Rather than customize Sunflower to support NOAA’s needs, the Department would like to see NOAA change its business practices to come in line with the other Agencies.

It was pointed out that this is a collateral duty for high-grade level Custodians and they are circumventing the business rules by sharing their IDs and passwords with lower-level employees to conduct Sunflower transactions. Judy said that this is understood and that these individuals are assuming the risk in doing so and they still accept accountability for any associated activities.

The Department has been fairly rigid concerning this request and Judy does not anticipated that they will change their position.

Candi pointed out that the lack of Property Contacts will directly impact the issue of timeliness. They need lower level employees to be able to record transactions to be able to remove a layer of staff from the Property process. A ship Captain has more significant duties than the timely input of asset information.

Joy suggested that there should be a Junior Officer on the ship who would assume those responsibilities. It was suggested that the Captain should be assigned the role of an Accountability Officer so Custodian responsibilities can be delegated beneath him.

It was suggested that NOAA try to include the incorporation of the Contacts in the roll-out to the Line Offices because of the increased workload that will be placed on the Line Offices. Judy stated that this will not work because Joy doesn't have the authority to make that change; DOC controls Sunflower.

6. DOC Sunflower migration issues

There were complaints that the Line Offices were not warned of the changes that would be associated with the move of the server. They had been told that the transition would be seamless and now they are finding out that a VPN is required to give their employees access. Judy said that detailed information was distributed. Candi asked for the distribution list because many OMAO employees didn't receive that information. Judy said she would provide that list. Larry said that contract was first made to the IT leads in the Line Offices. Candi said that her IT lead was unaware to the process and OMAO ended up in crisis mode to address the changes. Candi has been directed to provide answers to why this occurred.

Judy asked whether any other Line Offices had been so affected. Jan responded that many staff members located off-site were impacted when trying to certify their inventories. She was also unaware of the need for VPN access. Judy said that this issue had been handled by the Department through WFM. Lana, at DOC, assured Judy that they had a list of people who were contacted and that she could provide the list.

OAR is also incurring issues and would also like to have the list of who was notified regarding the migration. NMFS also requested a list. Michelle reported a problem in Seattle. When trying to use VPN, they cannot access the forms. They solved the problem by using CITRIX, which is more secure.

Other Line Offices reported that they use CITRIX because VPN is not a viable alternative. VPN is not being recommended by IT in Seattle.

Closing Remarks

Michelle wanted to remind everybody to advise their people that when they sent materials to the warehouse, whether it be to Dean or Debbie, please leave the CD numbers on the assets.

Joy pointed out that PPMB isn't going to Final Event any asset without proper documentation. If items go to the local recycle center, there needs to be certification of the transaction. If the recycle center will not provide documentation, NOAA employees must provide adequate documentation in which they attest to the event. That being said, the PMs should periodically validate the documentation being provided. PPMB has recently been called on the carpet when Final Event documentation that had been provided which was not accurate.

Debbie remarked that when items are reported to be excessed, the material should be de-installed and/or disassembled to be ready for pickup. When items are taken to the recycle center, barcodes should be removed from assets when they are delivered.

Judy announced that PPMB is going to start distributing Property bulletins. Whenever there is confusion surrounding a situation, a bulletin, signed by the PMO, will be distributed to clarify the issues.

Someone asked whether the a bulleting was going to be distributed regarding the identification of required supporting documentation for the UPR; the separation of the CWIP UPR from the other UPR records. Judy said that related changes to the CWIP policy had been generated from the CWIP workgroup during the last week and had been sent to Heather in Finance. Heather responded that the CWIP UPR changes are not going into the CWIP policy and procedures.

NEXT MEETING

The next meeting is scheduled for 11:00 on 1 July, 2010.