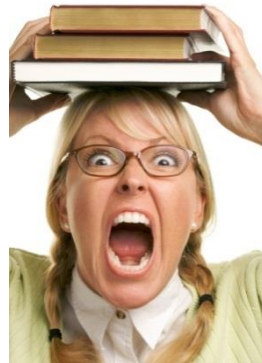




# Welcome to IMCAT 2015

*Textbook*  
**Audits &  
Inventories**



***IMA***  
***Survivor!***

*The Year End Audit*

# Agenda

- Introduction – Audits and Inventories
- Year End Auditing (Electronic Record vs. Paper)
- Individual School Preparations
- EVI, Large Print and Braille
- Who Reports What and When (at each school)
- District Warehouse Audit
- Suggested Sessions to attend



# Introduction



## ● **Auditing:**

A formal examination, a systematic check or assessment, especially of the efficiency or effectiveness of an organization or a process, typically carried out by an independent assessor.

## ● ***Why?***

Your district **NOW** owns the books and is accountable for them.

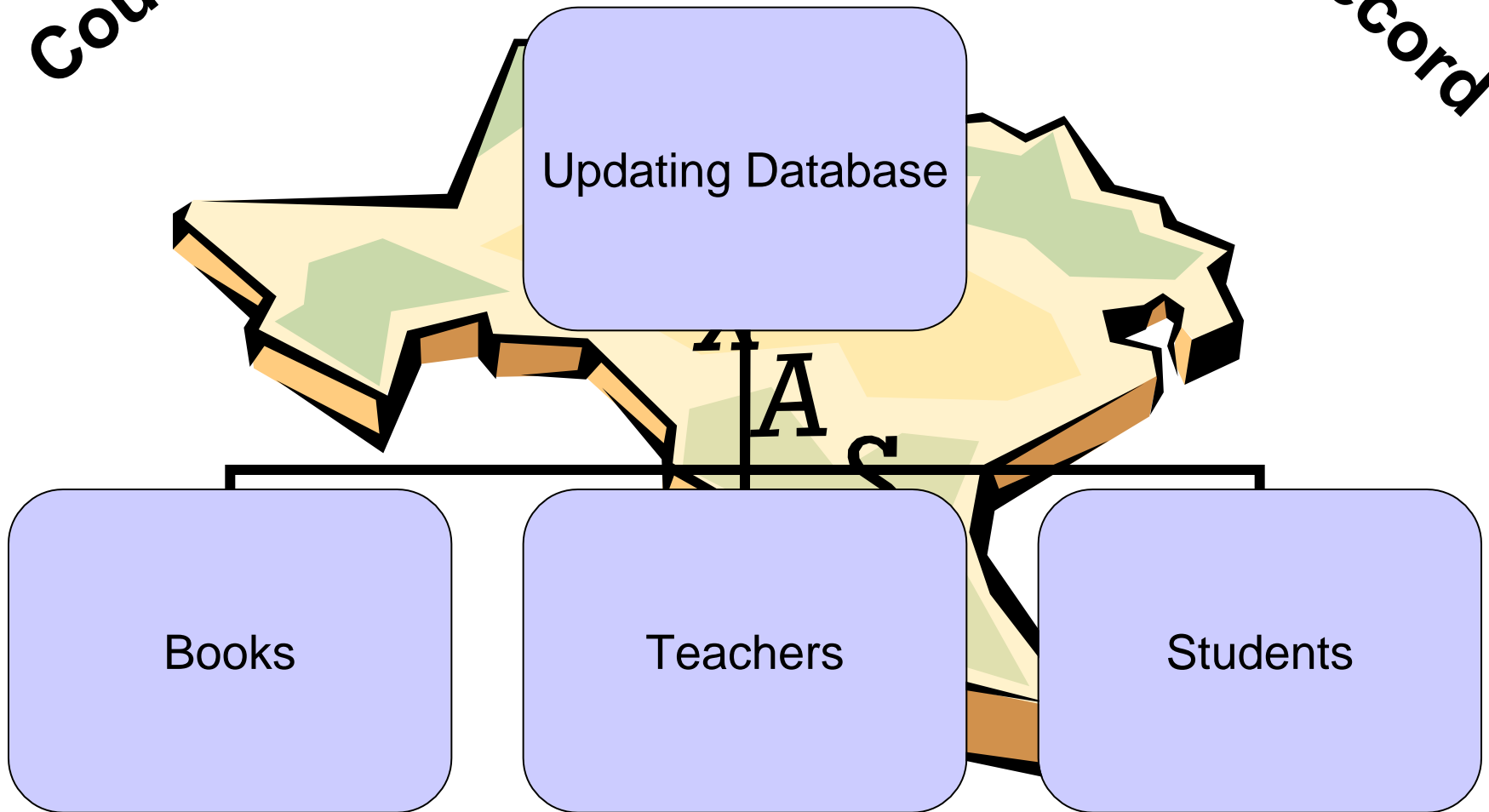


# BEGINNING THE YEAR

Count

Example

Record



Record

# MID-YEAR Example

Count

TIP

Database  
Distributions

Books

Teachers

Students

Distributions

Returns

Distributions

Returns

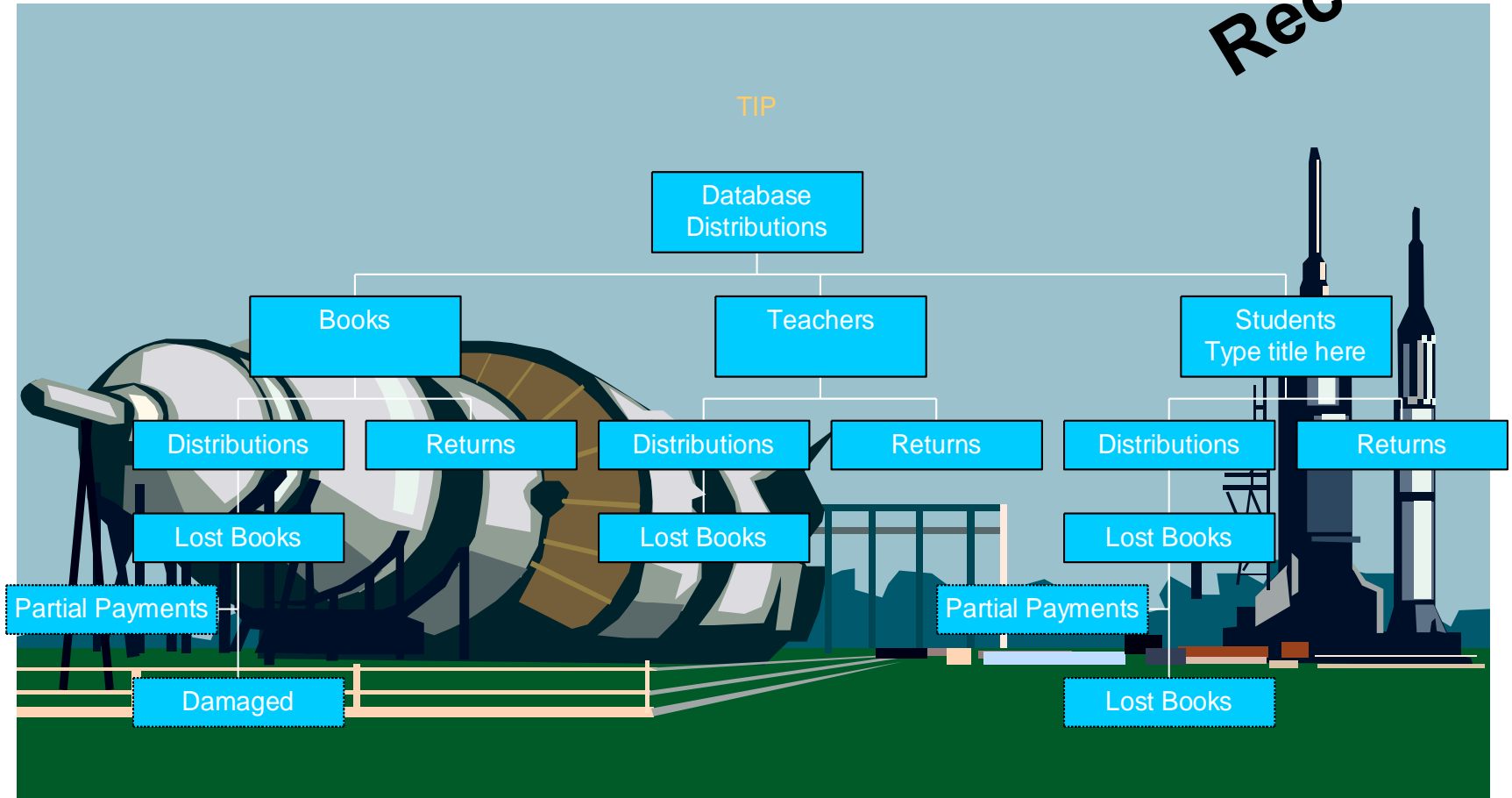
Distributions

Returns

# END OF YEAR OR SEMESTER

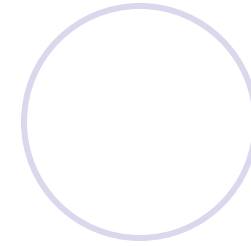
## Example

Record





# Data Control



Change Status of Student Distributions to “Lost”

Change Status of Teacher Distribution to “Lost”

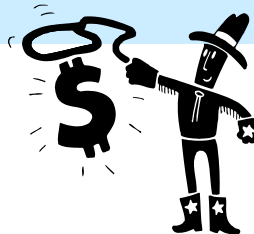
**Count**

Remove/Archive Cleared Students

**Record**

Remove/Archive Book History for Students

Remove/Archive Book History for Teachers

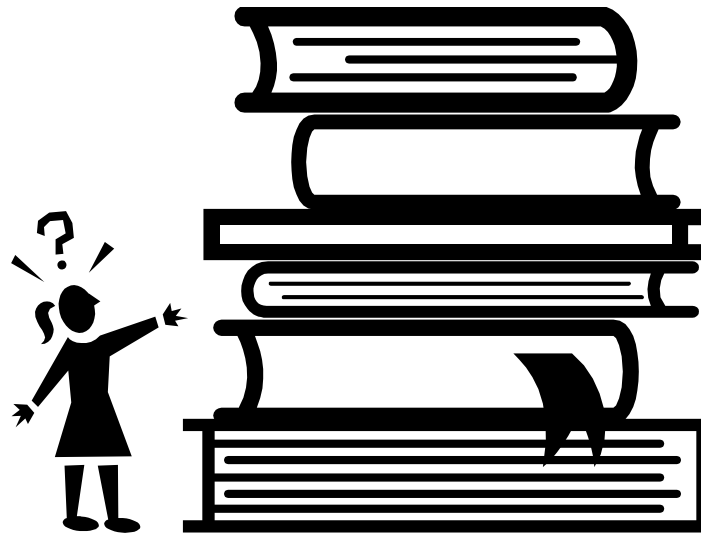
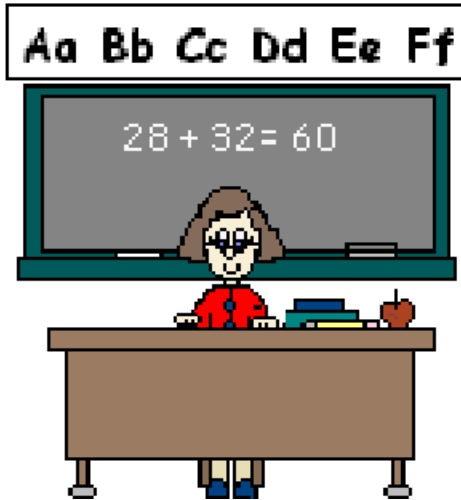






# Campus Audit v/s District Audit

Who's counting?



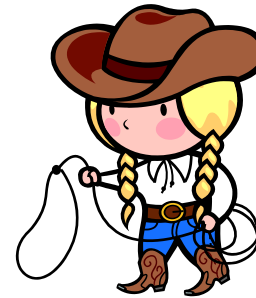
**Textbook Numbers**

# INDIVIDUAL SCHOOL PREPARATIONS

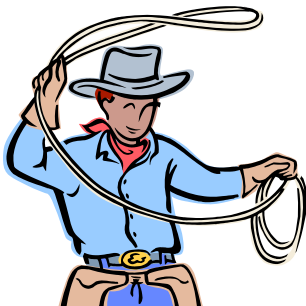
ELEMENTARY SCHOOLS



MIDDLE SCHOOLS



HIGH SCHOOLS



DISTRICT WIDE





# SCHOOL PREPARATIONS



- **Count** -Establish a required process at the beginning of the school year.  
(Who is responsible?)
- **Record** -Utilize a standardized system through out the district.  
(How is everyone recording?)
- **Train** –Conduct a formal presentation for starting, maintaining, preparing for year-end, and the audit.
- **Closing** –Who is the administrator responsible at each school when you arrive for the physical count / audit.



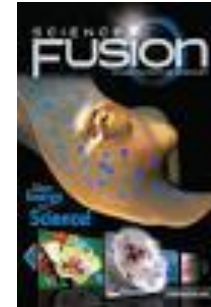
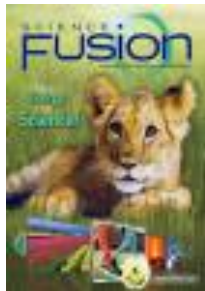
# Year End Auditing and Data Collection



## Consumables

[Workbook order form](#)

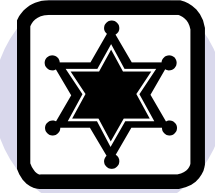
Count



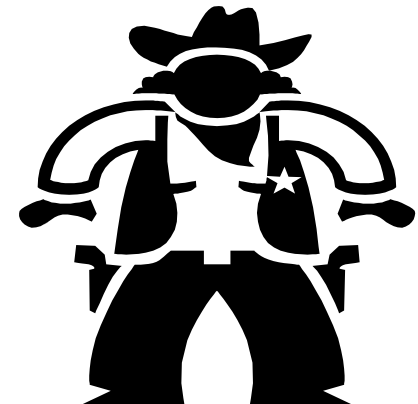
Record



# Audit Procedures



- Establish procedures for campus audits
  - Audit Schedule [Audit Schedule.xls](#)
  - Textbook Room Organization [Elementary Inv. Notes.doc](#)  
[Middle school Inv. Notes.doc](#) [High School Inv. Notes.doc](#)
  - Book shelf organization [Bilingual textbook memo.doc](#)
  - Teachers edition
  - Rating scale [Audit Rating Scale.xls](#)





# BOOK ROOM



- Stack textbooks in 5's to facilitate counts.
- Use the MLC (Multiple Listing Code) sequence.





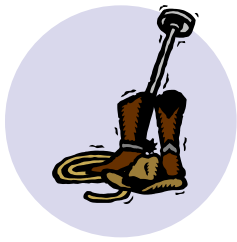
# Sequence using MLC



Elementary School



Counts by 5's in Odd Size Shelving



# Sequence using MLC



Counts by title view double and single shelves.



# Identifying Spanish books from English books during audit



# Sequence using MLC

High School

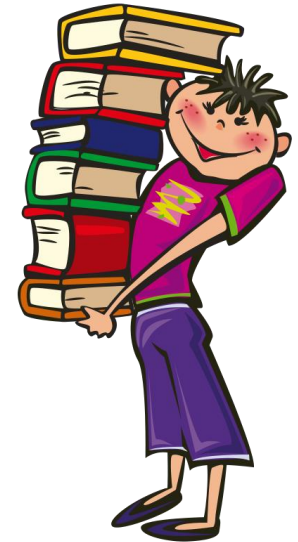


Counts by 5's in 5 shelf bookrooms

# EVI

## Large Print & Braille

1. Tracking material at campuses
2. Receive your books in EMAT
3. Campus year end returns
4. District return to TEA (Nov 2 – April 8) [Instructions for Shipping Surplus Braille and Large Type Instructional Materials.pdf](#)





# Who Reports What and When?

(at each school)



## Who?

- Assigned Textbook Administrator (*must have at every school*)
- Assigned Textbook Clerk (*assisting Textbook Administrator*)

## What?

- Lost Textbook Report (*with School Principal's signature*)
- Revised Lost Textbook Report (*for found books*)

## When?

- At the end of every Grading Period (*Book Check, 6 or 9 wks*)
- Final Year-End on the last day of school (*Prior to Audit*)

# District Warehouse Audit

- Conducting Audit

- Textbook audit of all surplus material stored in district warehouse

- TEA Inventory Report

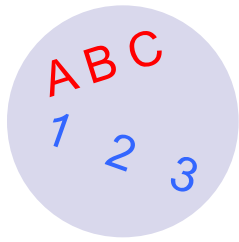
*(must have TEA user ID or access person to print report)*

- Cross reference TEA inventory with district warehouse and campus distributions

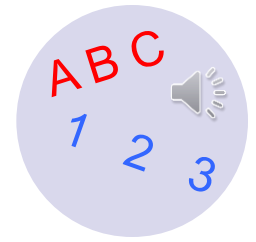
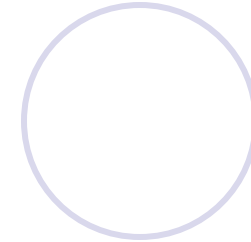


# *Suggested Sessions to Attend*

- **T** - Ordering eBooks vs. Printed Materials
- **A W** - Tracking Instructional Materials
- **T** – Organize Online Access Codes, Master Codes, Usernames & Passwords
- **W** - Out of Adoption Materials, Donating, Selling & Recycling



# In Summarizing



- Introduction
- Year End Auditing (Electronic Record vs. Paper)
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- EVI, Large Print & Braille
- Who Reports What and When (at each school)
- District Warehouse Audit
- *Suggested Sessions to attend*

**Record**

**Count**

# ***IMA Survivor!***

**Count**



**Record**



# Where to Get More Information

- IMCAT Website: <http://www.imcat.org>
- Neighboring School Districts
- Winni Petersons (281) 634-2947  
[winni.petersons@fortbendisd.com](mailto:winni.petersons@fortbendisd.com)
- Accountability: CMD LEGAL District Policy, Texas Education Code 31.103 and Texas Administrative Code 19, 66.107
  - Ultimate Responsibility
  - Textbook Order Accountability
  - Recording all Distributions as they are done