Lodi Unified School District
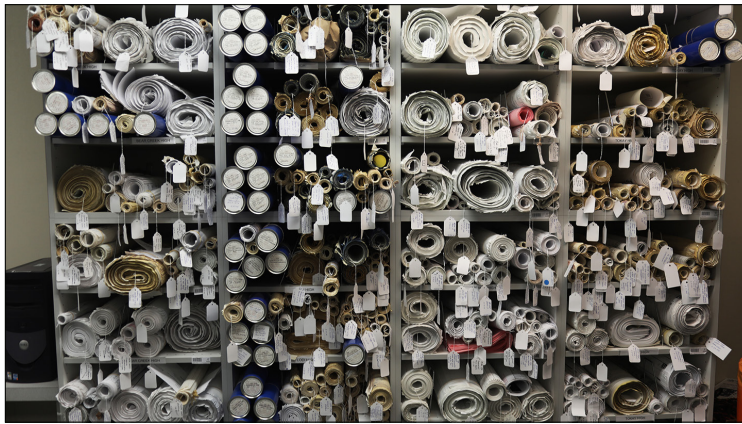
Facilites Team Goes Digital to Save Time and Money with ARC Solution

> " Having it [building information] available on mobile devices is key. It's a huge savings in time. Within minutes you're looking at the page you want to look at. "
>
> — Tim Edsell, *Mechanical Systems Supervisor, Lodi Unified School District, Lodi, CA*

Managing decades of paper documents had become inefficient and risky

The Facilities Team for the Lodi Unified School District manages a huge territory that spans 350 square miles and includes 55 buildings. Located just 35 miles south of Sacramento and 90 miles east of San Francisco, Lodi is referred to as Northern California's hottest new wine country destination.

There are 65 technicians across the Maintenance and Operations, Groundskeeping and Custodial functions who are tasked with managing 3 million square feet of facilities space. Streamlining maintenance tasks and construction upgrades is a must to ensure maximum productivity and provide the highest possible service levels across this district.

The Sr. Director of Operations, Warren Sun, is no stranger to digital transformations. Nearly ten years ago he orchestrated a paper-to-digital transition resulting in a 90% reduction in paper-based applications and a 75% reduction in the processing team headcount.

Drive Time Impedes Productivity

When Warren Sun was promoted and starting running the maintenance operations, he identified two main areas of concern - both related to paper documents.

First, there was a liability associated with relying solely on paper documents and a few digital files stored on a local server. If a catastrophe, such as a fire, damaged or destroyed the documents, the team's ability to work efficiently would be seriously impacted. In addition, significant costs would be incurred to recreate the lost documents.

Even without a catastrophic event, the paper documents were aging and starting to show signs of wear and tear. Plus they were at risk of loss when documents were loaned out to an architect or engineer.

Productivity was another issue related to reliance on paper documents. Technicians often received service requests while completing another assignment.

Mobile access results in less down time

Cloud-based storage for secure sharing

Simplified search finds any document in seconds

Warren Sun, *Sr. Director of Operations*

Typically, they drive to the site to identify the problem, then drive back to the Plan Room to pick up the paper documents required to complete the service request and then drive back to the site to perform the work. This was particularly frustrating to the team as they often felt like they were spinning their wheels.

With the footprint of the school district being so large, technicians were spending a high percentage of their time driving vs. performing actual work - driving up costs while negatively impacting productivity and customer satisfaction.

Forward-thinking FM Team

Both Sun and Edsell were always on the look-out for ways to respond faster and provide the best customer service possible.

When ARC's Regional Sales Manager Rick Carr stopped by to meet the team at Lodi, Sun quickly realized the potential of ARC's solutions and how they could benefit the district.

Sun had heard about cloud-based building information and document storage and thought it was clearly the best of all options. When he presented the solution to his team, they were receptive and wanted to know more. There was visible relief as they heard about the possibility of an easier way. "Why haven't we done this before?" was the response. Of course there were questions too.

Two things crossed their minds. There was concern about what implementing ARC would really mean for their operations and whether it would deliver the productivity improvements and cost savings they had heard about. Plus, how were they going to fund this initiative?

Their Chief Business Officer supported the initiative and assembled a plan to share the initial funding across a number of functions within the District.

The next question was "Who's going to do the heavy-lifting associated with converting paper documents to digital files?" To their

surprise, they discovered they had very little to do. They simply coordinated the pickup of the documents with ARC's Professional Services team.

Sun and his team worked with ARC Professional Services to define a file structure - ensuring the documents would be easily accessible in their digitized form. The team also recognized they would need to be diligent about managing the file structure going forward.

Three months later, all of the building information plans were in digital form and stored in the cloud. Sun said the process was essentially seamless and once the first batch of documents had been scanned and returned, any lingering fears about the loss of, or damage to, their documents were gone.

90% of the Lodi building information documents are now digitized. In fact, the last batch of files was finished a couple of months ago. All that remains to be scanned are a few older O&Ms and parts manuals.

Watch the video at: www.e-arc.com/customer-story

Customer Satisfaction on the Rise

The Maintenance Team was already a forward-thinking group and utilized technology whenever possible to streamline their operations. In fact, the use of tech had been instrumental in filling gaps when budget cuts resulted in a reduction in force. Implementing ARC was really just another milestone in their journey to full digitalization.

Sun's team has had only positive comments about using the ARC Solution. In fact more and more technicians are asking when additional plans will available on their mobile device.

Sun did make the observation that the younger generation of technicians, mechanics, and electricians are more used to using technology and actually expect it. While other team members might take more time to adapt and adopt the technology, Sun believes that once they are accustomed to accessing digital documents, it will naturally become a usual part of their routine.

The ARC Solution is also useful to external vendors such as architects and engineers. Sun receives frequent compliments about the convenience and responsiveness associated with the system. It turns out the Lodi team did not realize how easy it would be to share files. Previously it was a major issue to provide a set of plans to an outside architect or engineer. Now it's a snap. They search for the file, attach it to an email and click Send.

Use of the ARC Solution and its archiving capabilities has expanded to other functions including HR and Finance. Even student files are being digitized. Sun agrees that it's the right move to digitize paper documents across all functions of the district. Eliminating paper and going digital improves productivity, preserves critical building information and frees up valuable real estate across the district.

From One Facility Manager to Another

Using the ARC Solution creates more efficiency for both the Lodi Unified School District Facilities Planning and Maintenance Operations. When the teams can access plans wherever they are, productivity soars and customers enjoy high levels of service. Warren Sun had this to say: "We wouldn't go back to paper for a minute and we look forward to utilizing other ARC Solution capabilities in the not-too-distant future."

ARC provides technology and document solutions for every stage of the building lifecycle — from design to build to operate.

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CS-PO-1118-02