

PROFILE

In operation for more than two decades, Edmonton Public School Board is the administrative and operational body supporting the more than 195 public schools in the Edmonton metro area. Its services include finance, human resources, information technology, planning and student services.

CHALLENGE

Until 2009, EPSB managed its more than 12,400 employee files and 2,500 applicant files in paper form, using a manual system to distribute them to end users in the system. The files in question were needed and used by employees who were remote from the EPSB corporate offices. These stakeholders, primarily school principals and administrators, would have to drive to the EPSB offices to pick up paper files, and once finished with them, return them to the EPSB office in the same manner. This situation was not only inefficient but also an information security concern.

SOLUTION

EPSB decided that it wanted to digitize these HR files and store them in an electronic repository for viewing and other purposes.

EPSB contracted Consentia to digitize the required documents and prepare them for addition to EPSB's Electronic Content Management (ECM) platform. As well, Consentia provided professional services resources to help EPSB develop a day forward scanning initiative which would complement the imaging work done by Consentia.

RESULT

Aided by Consentia's Service Bureau and Professional Services teams in Edmonton, EPSB was able to completely image their HR file series and implement a day forward imaging process that created a verifiable return on investment of \$1.08 million dollars within one year.



The system of file storage, maintenance and retrieval of the Human Resource record series was taxing on all involved. EPSB made a decision that electronic imaging of the files and storage in an Electronic Content Management (ECM) platform would be the best accessibility solution for the organization.

The question of how this task could be completed accurately, efficiently and cost effectively was raised. Was this a task that the EPSB could effectively do themselves, or was it a task that would be better done by an experienced company in the industry?

There were eight key performance indicators that EPSB considered when they decided to engage a service provider.

"Let the Experts be the Experts"

**Lea Beeken, Supervisor
District Records and FOIP**

1. Competence— Can an external service provider effectively do the job?
2. Security— How secure will the file management, access and transport of the files be?
3. Accountability— What is the acceptable response time, availability and training process for employees?
4. Partnership— Dedicated A team?
5. Value— Partner with an organization that provides value as well as value added services. Not necessarily the cheapest vendor;
6. Tenure— An experienced organization with significant experience dealing with large, sensitive file collections;
7. Process— A partner with a history of well defined and communicated processes;
8. Flexibility— A partner with the ability to affect change in elements of the process where necessary.

After evaluating a number of data management organizations, EPSB decided to engage Consentia based on its reputation and experience in providing trusted, value based services to its many customers in the area.

"Managing the employee files in paper format was becoming impossible. We could not slip one more sheet of paper into that room. I was afraid the whole space was going to collapse into the basement under the weight of the files. When staffing time came around, 10 to 12 supervisors would all be waiting around to view the same paper file after they had wasted their time coming downtown to see the files. All these problems were solved by the move to digital records."

**Lea Beeken, Supervisor
District Records and FOIP**

Scope

The project undertaken by Consentia and EPSB was two fold:

1. Preparation, scanning and indexing of current, existing files
2. Creating a culture and process for day forward scanning, so that going forward, files become electronic records immediately and housed in the appropriate areas of the ECM system.

“We had the opportunity to visit the Consentia Service Bureau and meet with the team that would be responsible for converting our documents. This set the foundation for clear and effective communication throughout the project. All aspects of the project were outlined before any work began, including plans for emergency retrieval of paper or electronic data. We were able to visit the Consentia Service Bureau site while conversion was underway, to view the process first hand.”

Mary Morris, HR Business Analyst

The scanning project, which made up the majority of the engagement, included 12,400 Employee files and 2,520 Teacher Applicant files. The total number of pages which were scanned and contained in these files was 1,601,265. This undertaking was one that no one in EPSB could, or would want to handle on their own. The project was completed by Consentia in 42 days—767 boxes of files, containing 1.6 million pages were prepared for scanning, scanned, named, quality checked and delivered to EPSB. Hard copy files were kept and stored on site by Consentia for a period of time in accordance with EPSB’s Document Destruction Policy.

The next step was to create the day forward process, which would encompass more file types than the original scanning project. This meant that going forward, most document that needed to be accessed by multiple users (such as assessment documents or progress reports) would be accessible in the ECM system.

Benefit

The benefit to EPSB is multi-faceted. Not only did this exercise create new efficiencies, it also created a significant Return on Investment (ROI) for the organization on an annual basis. The initial cost of a project such as this is significant. The decision to undertake this project came with great expectations for the results. EPSB realized a confirmed ROI of \$1.08 million based on cost savings and efficiencies gained by converting existing documents and implementing a day forward scanning process.

“Overall, the process of converting our paper files to electronic format, with the assistance of Consentia, was smooth and on schedule. (Authorized) staff can now view the contents of an employee’s file with the click of a mouse.”

Mary Morris, HR Business Analyst

“We would never go back to paper filing!”

**Lea Beeken, Supervisor,
District Records and FOIP**

Components of the ROI (per annum) include:

- Staff Costs—\$169,000
- Storage (Internal/External) - \$95,000
- Space Recovery—\$ 24,000
- Cost of lost paper Documents—\$420,000

Edmonton Public School Board Initial Cost Savings (\$1.08M)

