

PerfectForms Success Story: Visalia Unified School District

EXECUTIVE SUMMARY

CUSTOMER NAME

- Visalia Unified School District- Visalia USD

INDUSTRY

- Education

BUSINESS CHALLENGE

- Manage over 100 administrative processes
- Streamline workflow and reduce labor and printing costs

PERFECTFORMS SOLUTION

- Integrated PerfectForms into the existing secured network
- Replaced a paper based print order process with a PerfectForms workflow solution, saving an expected \$10K annually

BUSINESS CHALLENGE

With mounting budget cuts, Visalia Unified School District in California's San Joaquin Valley came under increasing pressure to improve processes and save money. The IT department specifically was tasked with looking beyond its own operations to help the entire district do more with less.

To support its population of 27,000 (K-12) students and 2,500 employees at 44 educational sites, Visalia USD identified more than 100 paper-based administrative processes that could be replaced with online, form-based processes. The forms targeted for replacement are multi-part and often multicolored, ranging in cost from 20 cents to over a dollar each. One form from the district's print shop department is used more than 15,000 times each year, costing more than \$10,000 alone.

In addition, these labor-intensive and inefficient forms typically have distributions which span several people and often multiple departments and physical sites. With tens-of-thousands of forms for many different purposes, Visalia USD recognized the savings in eliminating each paper form. But more importantly, the district recognized the much larger savings in automating processes and creating efficiencies in labor use, which accounts for 85% of its annual budget.

“Next to email, our process automation system, based on PerfectForms, is expected to be the most important means of communication in the district.”

-Al Foytek, Director Business Information Systems, Visalia School District

FORM AND WORKFLOW SOLUTION

Al Foytek, Visalia's Director of Business Information Systems, was initially drawn to PerfectForms because of the product's extensive functionality and affordability. PerfectForms worked with Visalia to provide workflow solutions to gradually phase out its existing manual administrative procedures, and is on-track to fully integrate PerfectForms into its administrative workflow. Ultimately, more than 100 paper forms will be converted to PerfectForms applications, which will be used by over 2,400 users. For example, the district expects to use PerfectForms to automate accident reports, substitute teacher requests, and transportation requests. The customizability of PerfectForms also enables Visalia's staff to create automated forms that look exactly like their paper based counterparts. This ensures an easier transition from paper to electronic forms and requires less training for teachers and staff.

In addition to providing custom form creation and processing, Visalia USD is looking to implement PerfectForms as a complete workflow solution, which will dramatically reduce processing time and save the district substantial resources.

BUSINESS RESULTS

PerfectForms automation will allow Visalia USD to dramatically increase efficiency and reduce costs. By cutting down the amount of time Visalia's staff spends on administrative tasks, they are able to devote more time to students and parents, therefore improving school performance. Savings are expected in many areas, including:

- **Reduced printing costs.** One process alone, which handles work order requests for the district's print shop, is expected to save \$10,000 per year in the cost of forms, and many times that figure in related labor savings.
- **Reduced labor costs.** Online forms eliminate costs for requisitioning, stocking, distribution and handling and save time with automated notification and electronic distribution.
- **Improved Reporting.** Management information summaries are generated faster and are more reliable as they are no longer subject to the errors inherent in manual processing. Records of all significant process events and data are archived and kept secure.
- **Expanded opportunities.** Visalia USD's implementation of PerfectForms for the print order process was simple, timely and can be easily adapted to create new workflow solutions.
- **Reduced maintenance costs.** Any technical problems are easily solved with the assistance of PerfectForms on-demand support staff who personally assist the district in finding quick answers to their questions and concerns at no additional cost.
- **Return on investment.** Visalia USD will recover its investment with the money it saves on paper and printing alone. Much larger savings are gained in efficiencies created for its workforce. These efficiencies come from things like online ordering, electronic distribution, electronic approval routing, on-line status checking, not having to drive orders/forms between locations for rush situations, electronic forms archiving, automated management summary of data, and overall faster processes.