From Chaos to Collaboration: Strategies for Digitizing and Streamlining Records Management

Presenter

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Houston Community College System

- Established in 1971
- 2,400+ administrative staff
- 6 colleges, 14 campuses
- 85,000+ students
Challenges: ‘Chaos’

What Things Were Like Before

- Unorganized and lost records
- Departmental silos
- Millions of documents in legacy system.....no RM capabilities
- No deletion of emails (121 million and increasing every year)
The Catalyst for Change

- Houston news headlines: HCC records found in a dumpster
- Reactionary
- External audit: 20 findings

Non-compliance

System Wide Inventory Revealed...

- Across campuses
- Across same departments
- Student records
- Employee records
- All locations

6-7 months to complete
“That’s our history, that’s not our future.”

Olivia Harris, Houston Community College System

Decision to go Digital
Changes for the Better: Key Considerations

- Old system vs. New System
- Different compliance levels
  - Federal and State Laws
  - Departmental Accreditations

Solution Selection

- New RM leadership
- New RM strategy: ECM Solution and “Email Sweep”
- Strategic and improvement plan presented to Board
- Industry peer site visit - Laserfiche in action
Solution Selection

Transparency
End User Needs
Access Search Share
+Seamless Integration PS & MS365

RM Needs
Monitor Track Destroy

Implementing Laserfiche
Laserfiche: Phase One

- Legacy system departments
- Migrated 8.7 million documents
- LF built initial record business plans
- Trained RM/IT project team
- Timeline: 1 year – goal reached

Top 4 RM Benefits of Going Digital

- One single robust system for RM
- Better manage destruction
- Lower physical storage space (paper/electronic)
- Greater security and access controls
- Prove integrity of record
- Records managed, secured, and accessible throughout lifecycle
Going Beyond Digitization: Collaboration

Phase Two: Automation

- Meeting with departments to map out processes
- Review processes in sandbox environment
Beyond Records Management

How Student Services Uses Laserfiche

Student Services Benefits

Admissions and Financial Aid
- Instant access across campuses
- Standardized business processes for student records

Student Advisors and Counselors
- Access to search and view Admissions and Financial Aid Dept. records
- Access the same student record simultaneously

Better student services
In Progress: Financial Aid Process

What We Learned + Future Plans
Business Continuity

- Enabling remote work, especially during Coronavirus
  - Already set up and ready to go – minimal disruption
  - Accessing records and documents
  - Clients have access and can be trained remotely
  - Still onboarding new departments remotely
  - All of which has made created success when working from home

Factors for Success

- Nested under legal department
- Vice Chancellor for IT had RM background
- If involved from beginning, may have done contracts differently
Lessons Learned............ 20 departments

#1 C-Level support a must
#2 Involve all key stakeholders
#3 Understand department business needs and priorities
#4 Standardize naming conventions

Current & Future Plans

To Do List:

✓ Laserfiche Phase Two: Business process automation through e-Forms
  ✓ Centralize and standardize e-forms platform – also affects records management practices
  ✓ Example processes: Using Forms to streamline & improve remote work
✓ Expansion project to onboard 24 departments
✓ Digital Preservation Project (archives and essential records program)
Questions?

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