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Charron Sparks
Assistant Assessor
San Luis Obispo County

Case Study

INDUSTRY
- County Government > Assessor

LOCATION
- San Luis Obispo, California

CHALLENGES
- Nearly 38 tons of physical paper caused structural risk to the Assessor's building
- Liability risk required timely digitization project

BMI PRODUCTS & SERVICES
- 2.5 million pages of building records, parcel diaries, and history records digitally scanned at BMI's secure conversion facility
- Transportation of paper records to and from the County twice a month
- Digital files uploaded via FTP to County OpenText document management system

BENEFITS
- Collaboration on custom indexing schemas for unique document types
- High quality scanned image records offer easy retrieval and viewing within OpenText document management system

Overview

The role of the Assessor's Office in County Government is to discover, inventory, and value all real and personal property in the County. Other responsibilities of the Assessor include creating and maintaining assessment maps and updating property ownership records for all County property.

Charron Sparks, Assistant Assessor, states that "Historically, our Department used to live and die on paper, but we have been embarking on a strategy of taking property records into the digital age."

A key part of this overall strategy started in 2005 when the Assessor moved buildings. Several years following, it was determined the paper records transferred to the new building were too heavy, causing a liability risk for the County in the event there should be exceedingly high winds or an earthquake. Having worked successfully with BMI Imaging in the past, the County relied on the partnership to help digitize the records and import them into an existing OpenText application.

Nearly 38 Tons of Paper Challenges the Structural Integrity of New Building Floor

The County Assessor's office had hundreds of thousands of property records on paper. The team relied heavily on the manual distribution, physical storage, and manual retrieval of paper documents.

When the Assessor moved buildings, space became an issue. Sparks explains, "Even after purging 25% of the records, our team still faced a serious space conundrum. The remaining paper archive weighed nearly 38 tons and we learned that the structural integrity of the building was at risk."

Liability Risk Drives Need to Quickly Digitize Records

Sparks states, "The County was facing liability risk and we had to act fast in order to avoid a costly retrofit that would have impacted usable work area. At the same time, we knew that digitally converting these files was still a complicated project. We were still in the process of deploying our OpenText document management system and there were programming contingencies that would determine how we would digitize, index, and import these records. We needed to be careful to select a vendor that we could trust to accomplish our digitization goals."

Prior Experience with BMI Imaging

On October 17, 2017, the County Board of Supervisors approved the OpenText Upgrade and Assessor Records Transition Project, a joint effort by the Assessor and Information Technology departments to digitize more than 168,000 property files.

Sparks states, "The County has had a successful experience working with BMI Imaging. We have BMI's Digital ReeL microfilm scanning solution deployed in a few County departments. BMI also helped the Assessor with a custom annotation

solution that delivered exactly what we were looking for."

"When we contacted BMI about this new project, they eagerly jumped in and helped craft a strategy on our timeline", continues Sparks. "We did not even have an official contract in place, yet the team understood the sense of urgency. After completing a proof of concept, we felt comfortable moving forward with BMI."

Communication, Collaboration, and Customization

Sparks states, "I have been with San Luis Obispo County for over 30 years. BMI Imaging is an A+ vendor and the best one I have worked with. The team was near instant in their responsiveness, they collaborated with us throughout the entire process, and were able to offer custom options unique to our environment."

Overall, the project involved the Assessor team prepping the paper files with barcoding and boxing them for shipment. BMI would pick up batches of 85 boxes for scanning every two weeks. BMI would then scan and index each document, create an electronic file, provide onsite QA and then facilitate uploading of the file into the OpenText document management system hosted by the County of San Luis Obispo.

Parcel files documents are working files and thus scanned images were placed directly into production because they were needed by staff. The County team worked closely with the BMI scanning team. Sparks states, "After a successful 2 box and then 20 box pilot scan training, we had confidence that the product would be delivered with our desired quality level."

Sparks continues, "Our team reviewed all documents for quality and accuracy within one week of upload and found that BMI exceeded our required 98.6% accuracy level. The few errors were mostly related to document indexing and easily corrected."

"Every large project like this has issues to work through but this one had very few," states Sparks. "The key word is *work through*. I remember one instance where BMI proactively reached out to me to point out a billing discrepancy that was in our favor. In another instance, they re-scanned over 20 boxes because of an issue discovered on their side with the scanning software."

Conclusion

According to Sparks, the project ran like clockwork. Keys to the success of this project were constant communication between the County and BMI staff, a schedule everyone could stick to, and the trust between the County and BMI.

In the end, San Luis Obispo Assessor eliminated nearly 38 tons of paper and now has high-quality digital documents in their management repository that makes it easier for the Department to serve the County's citizens.

The area once occupied by the property files and their shelving units has been repurposed into two scanning stations and three work pods.