



Capistrano Unified School District

Frictionless records management: How Capistrano School District traded frustrating spreadsheets for real productivity

1

person team

25%

time savings

>300

requests in the past year

OVERVIEW

Capistrano Unified School District (CUSD), one of California's largest school districts, faced significant challenges managing California Public Records Act (CPRA) and subpoena requests. With a high volume of requests for a one-person team and a manual, fragmented process, Bridget Haley, the district's human resources manager, sought a more efficient and centralized solution. Transitioning to Records Request Management (GovQA) to manage all CPRA and subpoena requests in one place streamlined operations, improved collaboration, and saved substantial time and resources.

SITUATION | SCATTERED SPREADSHEETS

Before implementing Records Request Management, CUSD relied on spreadsheets, email, and multiple disconnected systems to manage CPRA and subpoena requests. Haley described the process as "horrible," with redactions done manually using Adobe, pen and paper, and documents scattered across three different platforms. The inefficiencies were compounded by the fact that she was the only person handling CPRA requests, which could number more than 300 in a single year.

Working for such a large district with a substantial amount of CPRA requests led Haley to seek help from government technology. However, before finding Records Request Management, she tried a solution that left her wanting more seamless support. "We did use another product before, but it was impossible," said Haley. "That's what led to my decision to come to Records Request Management — because everything is housed in one place and I can do all my redactions by myself. I found the system super easy to work through and learn."

The district also faced challenges in coordinating with internal departments and external legal counsel, often relying on lengthy email chains that were difficult to track and manage. Adding to the manual lift, subpoena responses were mailed or sent via FedEx, with no reliable way to confirm delivery or access.

MUST HAVE SOLUTIONS

Records Request Management

Don't even think twice — just do it. Everything is in one system. It's easier to make everything flow and get things done in the little bit of time that we have."

Bridget Haley, Human Resources Manager, Capistrano Unified School District



The process hiccups led to delayed turnaround times that affected both CUSD and the residents and trustees it serves. All parties lacked timely resources at their fingertips, felt the frustration of long wait times and outdated processes, and struggled to collaborate across departments.

SOLUTION | CENTRALIZED, CLOUD-BASED COLLABORATION

Granicus' Records Request Management solution provided a centralized, cloud-based platform that allowed Haley to manage all CPRA and subpoena requests in one place. "It was super easy to get into, start using one system, and communicate with whomever I needed to – whether it's internal or external," said Haley.

The system's built-in redaction tools enabled her to upload documents, apply redactions, and allow reviewers – such as cabinet members or attorneys – to provide feedback before finalizing responses.

Collaboration became seamless, with internal departments and external legal counsel able to access the information relevant to them. The subpoena module allowed for secure, trackable delivery of documents, eliminating the need for physical mail. Haley also leveraged customizable dashboards and automated reporting features, which allowed her to send weekly updates to the board of trustees without manual effort.

"Every Friday, the trustees get an emailed copy of the report that was set up through the system so they can see where we are at," said Haley. "That is one thing I love about the reports; they were very customizable. And if I want to take a Friday off, I could take my Friday off and everybody still got their reports."

Perhaps most notable, the system's flexibility enabled her to tailor workflows to her needs on her time and train others to do the same.

RESULTS | FREE TIME AND FAST RESPONSES

The impact of Granicus' Records Request Management was tangible. Haley estimated the system cut her workload by at least 25%, freeing up time to focus on other HR responsibilities and even assist with implementing additional software solutions.

Other boast-worthy results included:

- ✔ **Significant reduction in paper usage**, contributing to sustainability and cost savings.
- ✔ **Improved collaboration** with HR, legal, and risk management teams.
- ✔ **Faster response times**, especially for repeat media requesters.
- ✔ **Automated weekly reports** to trustees.
- ✔ **Secure subpoena handling**, with full visibility into delivery and access.

Records Request Management transformed a complex, manual process into a streamlined, secure, and scalable solution. The adaptability allows CUSD to customize workflows, making it easier for new team members to onboard and succeed.